



## Managing Remote Teams during COVID-19

Jeff Sample, Director of Strategic Accounts



## WHY ME?

- ❑ 20 YEARS – Information Technology Services
- ❑ DevOps Engineer–*Software Development Lifecycle*
- ❑ SaaS Design      ❑ API's
- ❑ Cloud Solutions    ❑ RFID

### ❑ CONSTRUCTION IT

- IT Director
  - Safety Committee Member
  - Director of Media - JBKnowledge
- 
- ❑ Hospitality, Ski Resorts, & Health Care
  - ❑ Skier & IRONMAN enthusiast





# POWER TO THE TRADES

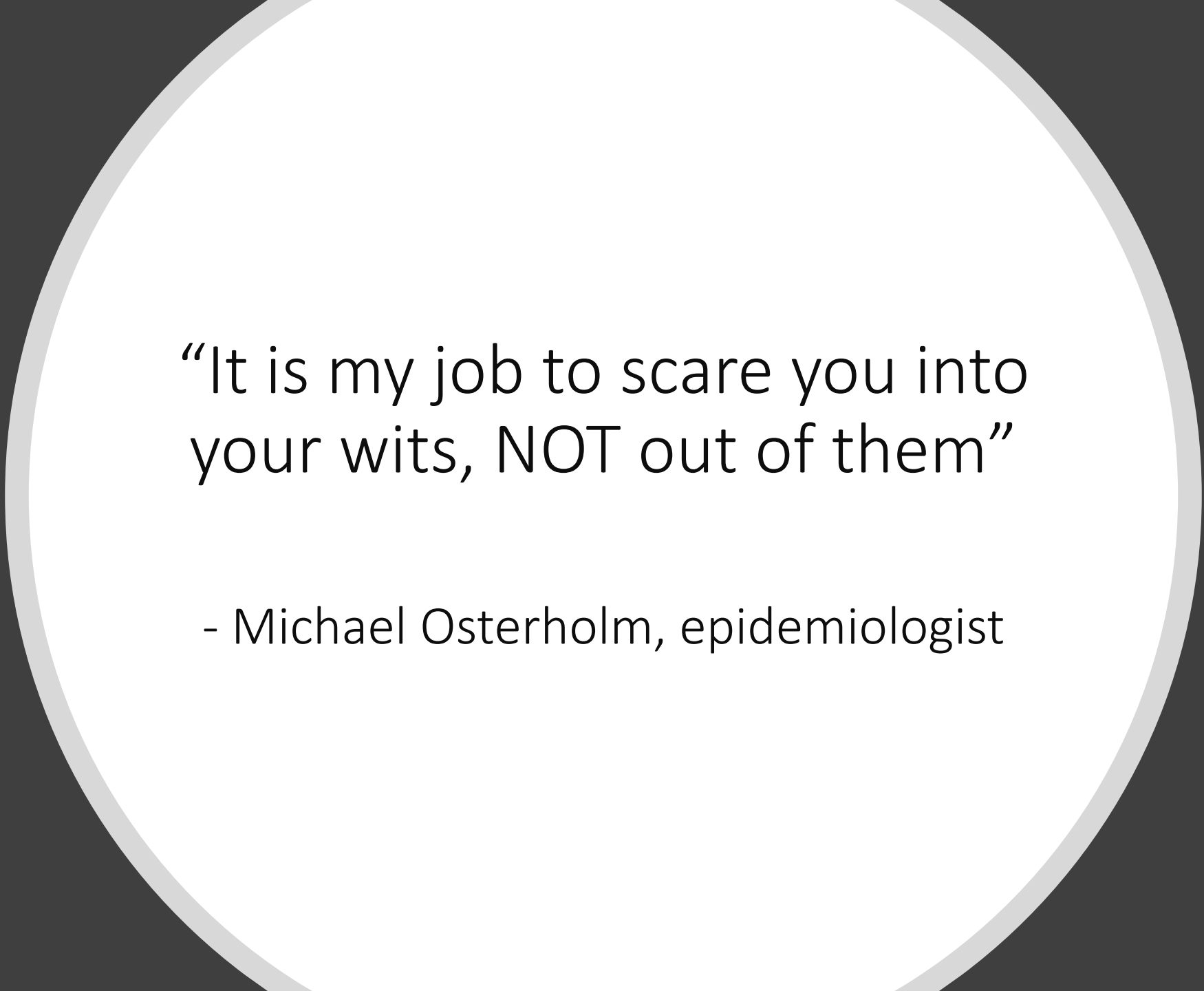
- ✓ Consultative Conversations
- ✓ Educational Webinars
- ✓ Best Practice Guides

[www.eSUB.com](http://www.eSUB.com)



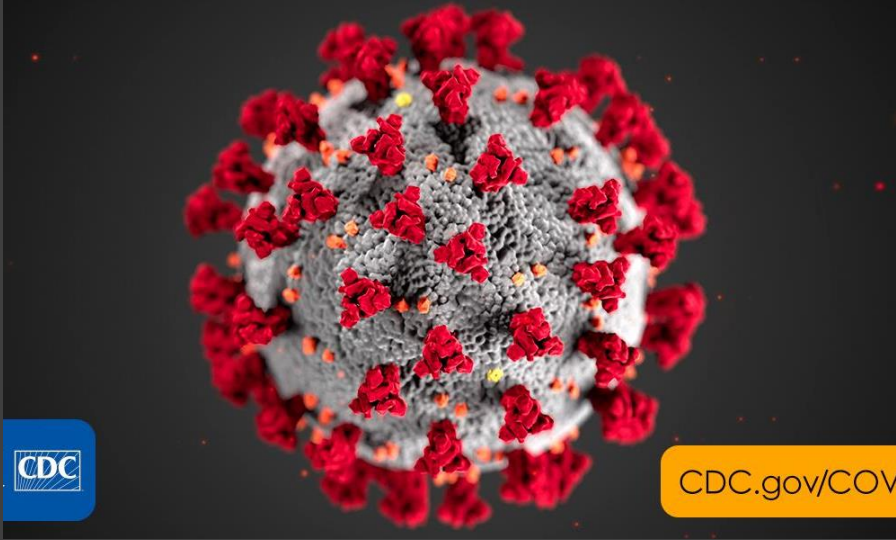
# Agenda

- Leadership – Beyond the Tools
- Project Documentation
- Remote Tools
- Extra Resources



“It is my job to scare you into  
your wits, NOT out of them”

- Michael Osterholm, epidemiologist



# The State of Construction

Three major challenges for any construction business:

1. Finding skilled labor
2. Project management and completion
3. Getting paid & making payments
4. Effects of COVID-19





Leadership

# The Case for Social Distancing

- **General Safety & Social Distancing**

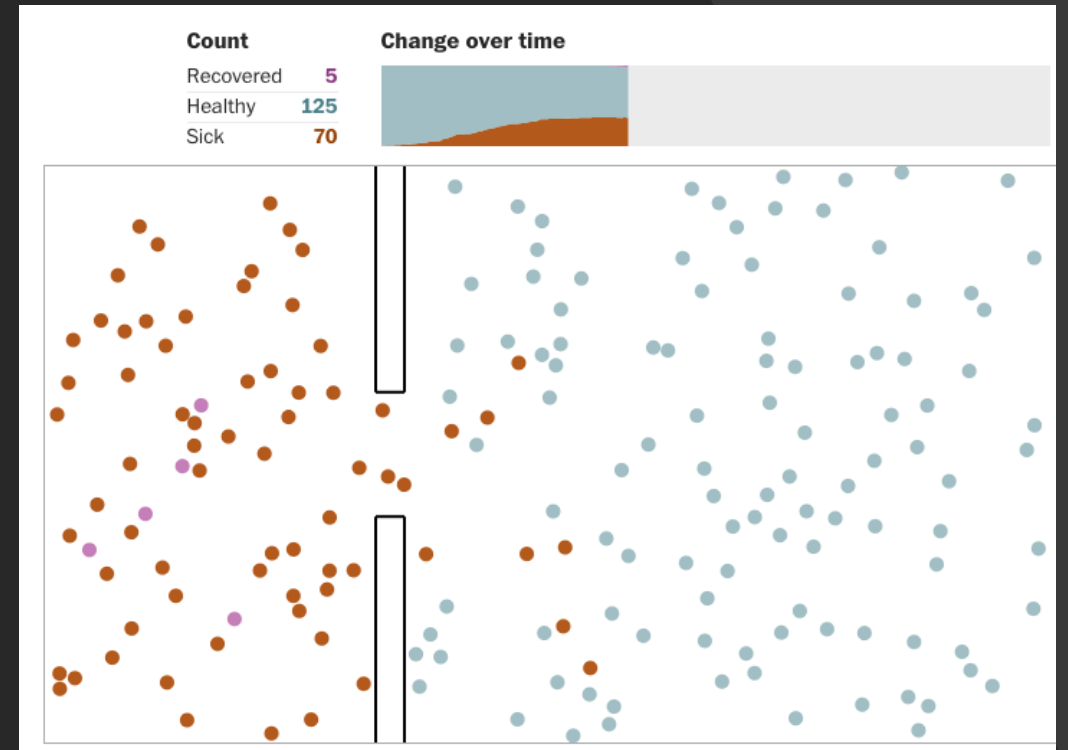
[\*Washington Post article\*](#) demonstrates the power of social distancing.

- **Flattening the Curve**

- **Jobsite Safety**

- 6ft away
- Clean Hands & Equipment
- Stay out of the Trailer

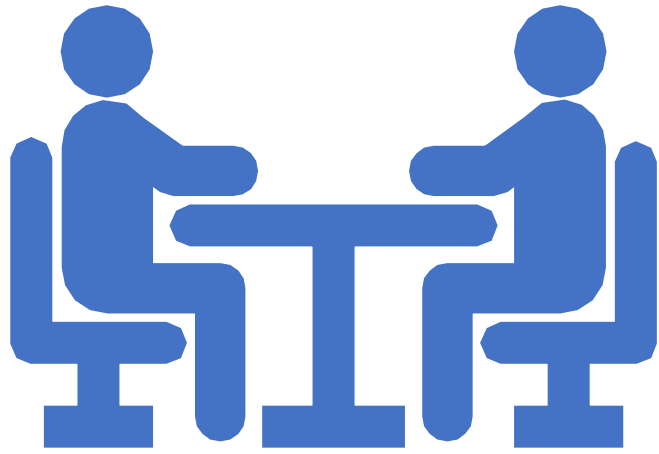
- **Office Safety – Prepare for Remote**





# Communication

Single Source of Truth



## Create a Communication Team and Hub

1. No more than 3-5 people - leadership team/corporate communications/ HR executive
2. Meet regularly to monitor situation as it evolves
3. Main source of information about the crisis
4. Regular updates to team-Daily

Transparent-what you know, what you don't know, and your sources of information

Succinct-explain in clear language, not lawyer speak

# Company Operations Tiers



**Tier 1**  
Normal  
Operations



**Tier 2**  
Abundance  
of Caution



**Tier 3**  
Minimize  
Exposure



**Tier 4**  
Community  
Containment

# COVID -19 Timeline

## A Case Study

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- Wed 3/4 CEO participated in national high-level executive briefing
- Thurs 3/5/20 CEO debriefed internal management to establish short terms policies
- Thurs EOD Employee survey “Occasional Work from Home” issued company wide
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- Tues/Wed 3/10-3/11 WFH training workshops
- Thurs 3/12 Company wide WFH
- Fri 3/13 Extended WFH Indefinitely – Pick up items to “Optimize” productivity
- Mon 3/16 Last day to pick up items from office prior to closure

# Project Controls

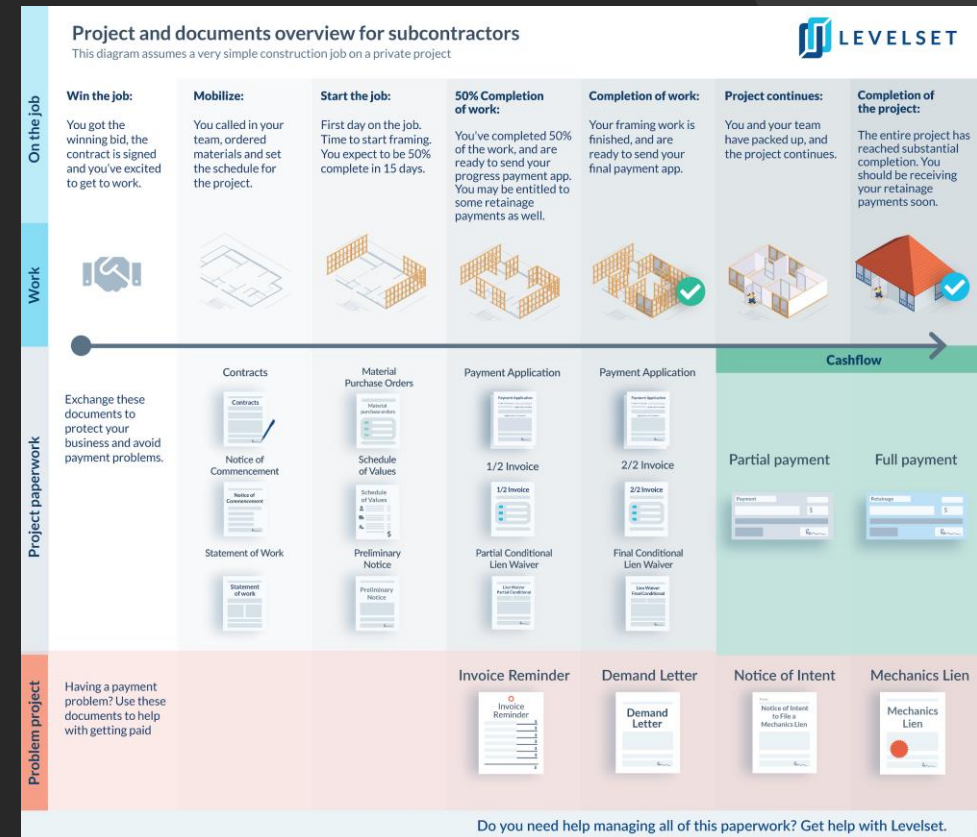
Everyday you leave the  
jobsite, could be your  
last for a while



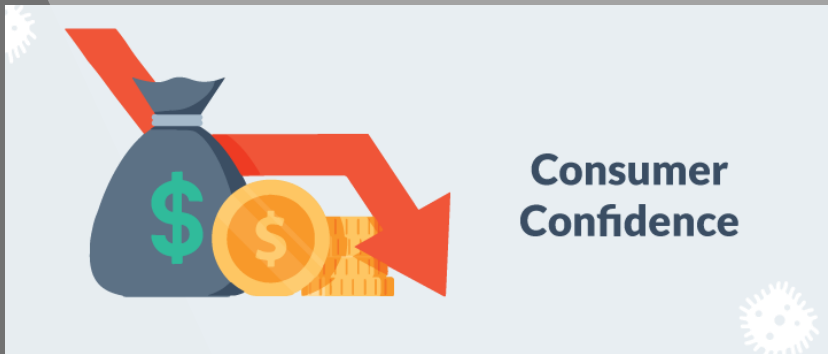
# Documentation is critical

## Project Management Basics

- Document work in place
  - Photos
  - Videos
  - Notes
- Centralized Document Controls
  - RFI
  - Change Orders
- Scheduling
  - Supply Chain
  - Manpower
- Real time Information
- Stored in the Cloud



# Wider Economic Impacts, Market Challenges



- Elevated risk of recession over the next 3-6 months
- Stock market crashing having immediate impact
- Lower interest rates generating more attractive loans
- Limited discretionary spending (residential and light commercial)
- Potential government assistance



# Legal Disputes & Protections

- Construction payments are typically a mess
- Tensions leverage and protections during uncertain times
- Legal disputes are expensive disruptions
  - Walking off the job
  - Job completion delays
  - Payment delays

*With razor-thin margins, any kind of payment hiccup can mean the difference between staying in business and closing your shop.*



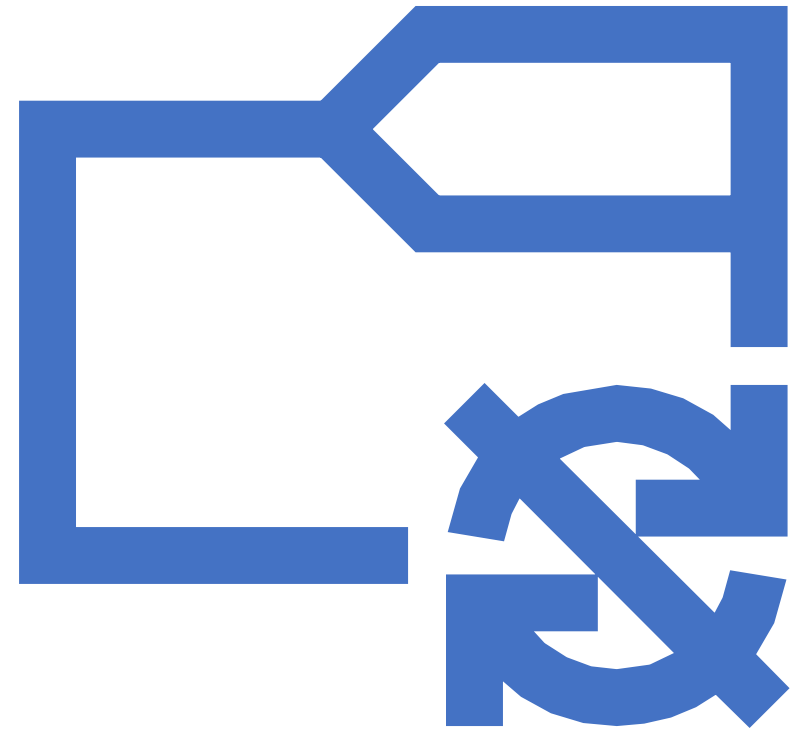
## Checklist for Contractors To Survive Coronavirus Impacts

1. Inventory & address immediate legal issues
2. Get strict about protecting lien rights on
3. Monitor your general contractor's payment behavior changes jobs to avoid someone else from tanking your business
4. Increase your cash cushion



A Digital Workspace

# Remote Tools





# The Challenges

- Office Communication
  - Face to Face
  - Meetings
  - Email
- Files Stored on Internal Servers
- Legacy Applications

Security



# Mindset Change



Agile Methods



Daily Check ins



Understanding Stress

# Introverts & Extroverts



Check in with each person



Vary the order



Know your people

# Office 365 – G Suite



**Teams**  
**Slack**  
**Hangouts**



**One Drive**  
**My Drive**



**SharePoint**  
**Shared Drive**






**Applications**  
Excel, Word, PowerPoint  
OneNote, Tasks, To Do  
Planner, Power Automate  
Docs, Sheets, Slides, Keep, Apps Script



# Teams & Slack

- Messaging
- Video Chat
- Screen Sharing
- Meetings
- Mobile

< >  Search or type a command  - □ ×

**Chat** Recent Contacts 


Recent

- New chat
- Benny Baltrosky** 12:52 PM  
lol
- David Gabbart 12/6  
You: Hey buddy- How is life in Sa...
- Adam Holden 11/7  
You: Great meeting you!! Keep up ...

Suggested

- Cody Riddar
- Gabe Rubin
- Jared Mugar
- JW Justin Wetherby
- NS Nathan Stickman
- Patty Bustamante
- WR Wendy Rogers

**Benny Baltrosky** Chat Files Organization 1 more ▾ +

 Benny Baltrosky 12:52 PM  
Don't do it

lol

★★★★☆ How was the call quality?

**Video Calls- Works from Android and iPhone with App**

**Voice Calls- Works from Android and iPhone with App**

**Instant Screen Sharing**  
\*\*Excellent for remotely working through software issues\*\*

**Chat functions!**

# Teams



UH

General

Posts

Files

Wiki



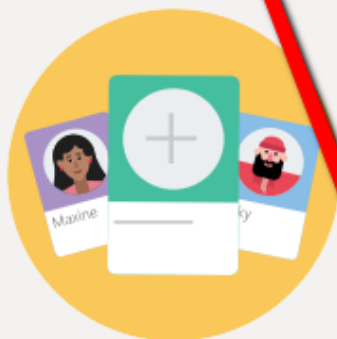
Team



Your teams

## Welcome to the team!

Here are some things to get going...



Add more people



Create more channels



Open the FAQ



Jeff Sample has added Benny Baltrosky to the team.

Start talking to the team! Share files (Sharepoint in the background).

Start a new conversation. Type @ to mention someone.





The screenshot shows the Slack desktop application interface. On the left is a dark sidebar with a list of channels and direct messages. The main area on the right shows a direct message conversation with 'Samantha Jandrisch'. Three red callout boxes with arrows point to specific UI elements: one to the 'Direct Messages' section in the sidebar, one to a plus icon in the direct message list, and one to the phone icon in the conversation header.

Slack | Samantha Jandrisch | eSUB

**eSUB** ▾  
Jeff Sample

Jump to... < >  
# xconbluebeam

**Direct Messages** +

- Slackbot
- Jeff Sample (you)
- Benny Baltrosky, Jenny ...
- Benny Baltrosky, Matt B...
- Benny Baltrosky, Wend...
- Brianna Maczko, Samant...
- Catherine Gutmanis-Buri...
- Catherine Gutmanis-Buri...
- Craig Wren
- David Gabbart
- Deak Hansen
- Erin Davon
- Jaci
- Jenr
- Jenr
- Kati
- Mat
- Sam
- Sharon Weldon

+ Invite people

**Samantha Jandrisch**  
★ | notifications snoozed | Samm J.

Friday, March 20th

Call Ended  
Ended at 4:15 PM - Lasted 13 minutes

You both joined

Yesterday

view for tomorrow? just wanna get my intro slides ready in

Is first thing in the morning or late tonight ok? Been trying to deal with kids.

**Samantha Jandrisch** 6:20 PM  
Whichever works best for you just wanted to get them before you start your webinar jam packed day

**Jeff Sample** 6:32 PM  
Totally understand. Trying to focus when possible but hasn't been easy

...e it easier!!

...th 2 kids Social Distancing.

Message Samantha Jandrisch

⌨ B I ↺ </> 🔗 ⋮ ⋮ ⋮ 📎 Aa @ 😊

When you are in a direct message you can call that person or the entire group by clicking the phone button. To share screens you must first be on a call with them.

Direct Message or start a new chat. These can be one to one or you can create groups on the fly. When you click the plus a Window opens to add members. (see next slide)

Slack is great for external communications and groups. See the list on the left of the other Slack Groups you have joined. Access them directly from here. Notice the white circle in the corner signifying activity in the group.





New conversation

Start a new Conversation  
from your contacts.



No recent chats  
[Start a new one](#)

# Hi, Jeff!

Get started by calling or messaging a friend below.



VIDEO CALL



PHONE CALL



MESSAGE

Everything at your finger tips for phone, video, and  
messaging.



Photo by Brian Matiash

# OneDrive

- Solve Local File “My Documents” issues
- Mobility with Cloud storage
- Mobile Application



OneDrive

Search everything

+ New ▾ ↑ Upload ▾ ↻ Sync ⌵ Flow ▾

Jeff Sample

My files

Recent

Shared

Discover

Recycle bin

Shared libraries

Thought Leadership

Events & Trade Shows

Consulting

eSUB Inc. Team Site

University Hospital Project

University Hospital Project

eSUB Integration


















Sales Power Team

[Create shared library](#)

[Get the OneDrive apps](#)

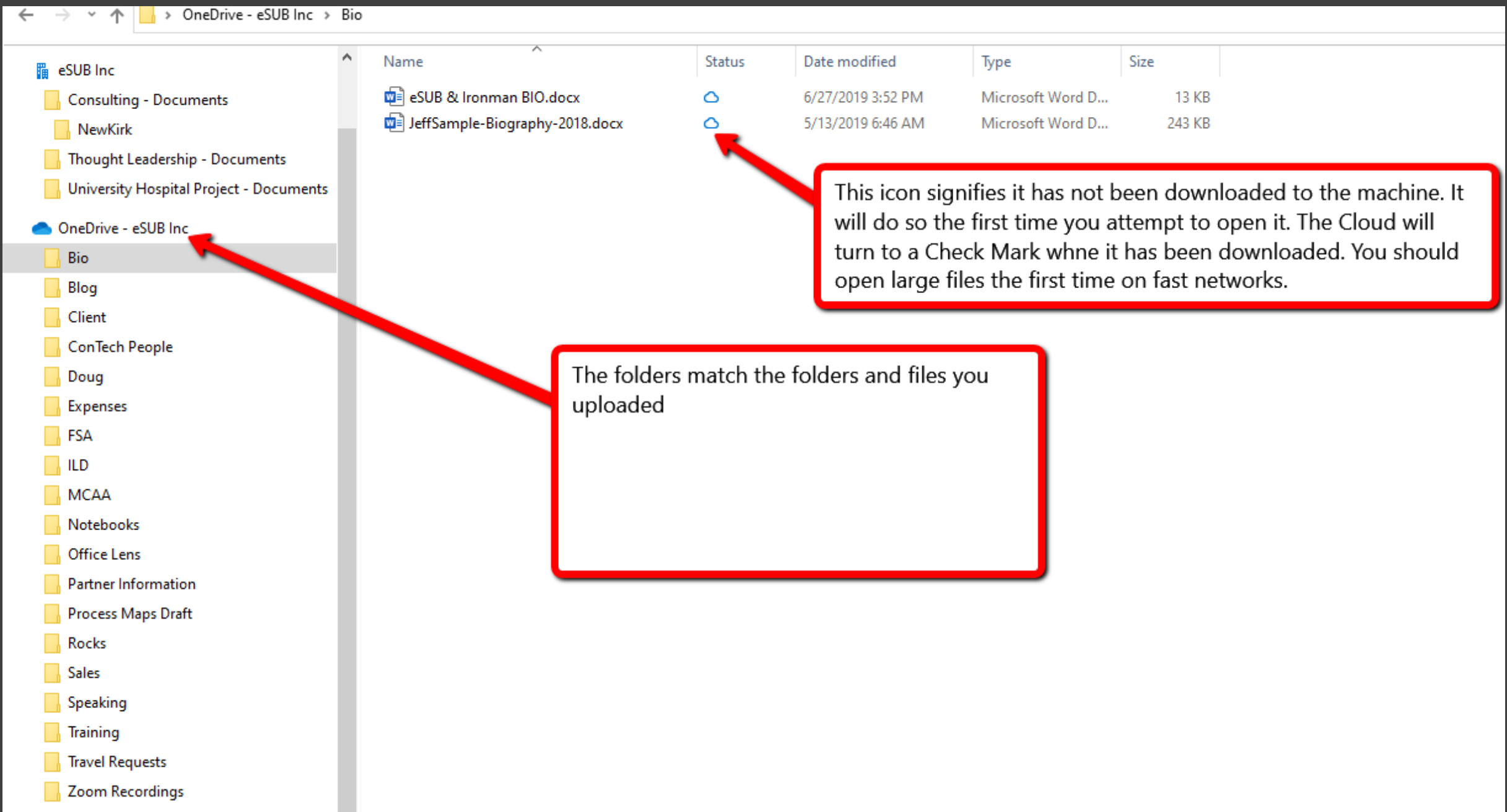
[Return to classic OneDrive](#)

## Files

 Name ▾	Modified ▾	Modified By ▾	File Size ▾	Sharing	Activity
 Bio	June 27, 2019	Jeff Sample	2 items	Private	
 Blog	June 10, 2019	Jeff Sample	3 items	Private	
 Client	September 27, 2019	Jeff Sample	2 items	Private	
 ConTech People	July 2, 2019	Jeff Sample	1 item	Private	
 Doug	May 10, 2019	Jeff Sample	2 items	Private	
 Expenses	April 26, 2019	Jeff Sample	19 items	Private	
 FSA	December 30, 2019	Jeff Sample	5 items	Private	
 ILD	May 14, 2019	Jeff Sample	5 items	Private	
 MCAA	January 13	Jeff Sample	3 items	Private	
 Notebooks	April 23, 2019	Jeff Sample	1 item	Private	
 Office Lens	July 11, 2019	Jeff Sample	10 items	Private	
 Partner Information	May 2, 2019	Jeff Sample	1 item	Private	
 Process Maps Draft	May 30, 2019	Jeff Sample	7 items	Private	
 Rocks	January 9	Jeff Sample	9 items	Private	
 Sales	December 13, 2019	Jeff Sample	4 items	Private	
 Speaking	May 13, 2019	Jeff Sample	7 items	Private	

Upload your My Documents Folder

Click Sync

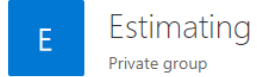


This icon signifies it has not been downloaded to the machine. It will do so the first time you attempt to open it. The Cloud will turn to a Check Mark whne it has been downloaded. You should open large files the first time on fast networks.

The folders match the folders and files you uploaded

# Sharepoint

- Solve Local File Share Access
- Collaboration for Teams and Departments
- Mobile Application



Your new site! Not quite done yet

★ Following

3 members

Search this site

+ New  Page details

Published  Edit

Home

Conversations

Documents

Notebook

Pages

Site contents

Recycle bin

Edit

News

+ Add 

Click here to begin adding files.





Keep your team updated with news on your team site

From the site home page you'll be able to quickly author a news post – a status update, trip report, or even just h...

Add News

Quick links

 Learn about a team site

 Learn how to add a page

Documents

See all

+ New  All Documents  

 Name  Modif

Activity



The new Estimating group is ready

Welcome to the Estimating group. Use the group to share ideas, files, and important dates. Start a



Estimating +1  
Sent 4 minutes ago




Jeff Sample  
Created site 4 minutes ago




View and share files

Collaborate on content with your team.

 Upload a document



Drag files here

 Microsoft Teams  
Communicate with your colleagues in real time by creating a Team for your Office 365 Group.   
[Create a Team](#)

Get the mobile app



Click here to upload files and folders critical to the team. Be thoughtful in how much you need and how much bandwidth you have. Files can be added later.

Search

[+ New](#) [↑ Upload](#) [Quick edit](#) [Sync](#) [Export to Excel](#) [PowerApps](#) [Flow](#) [...](#)[All Documents](#)

Home

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

Recycle bin

[Edit](#)

## Documents

 Name [v](#)Modified [v](#)Modified By [v](#)[+ Add column](#) [v](#)

Once the critical files have been uploaded. Access the site from each team members computer and click sync. This will create a copy of the file and folder structure locally on the computer and assist in accessing files through file explorer. This is not the full download of each file. That happens the first time you access the files. \*\*\*Warning\*\*\* Certain large files and file types have issues and can present difficulties. Contact support for your software or seek advice for specific file types.

Drag files here

Microsoft Teams

Communicate with your colleagues in real time by creating a Team for your Office 365 Group. [?](#)

[Create a Team](#)[Return to classic SharePoint](#)

Bids

File Home Share View

← → ↕ ⬆ ⬇ > eSUB Inc > Estimating - Documents > Bids

> Quick access

> Dropbox

▼ eSUB Inc

> Consulting - Documents

▼ Estimating - Documents

Bids

> Sales Power Team - Documents

> Thought Leadership - Documents

Name

Document.docx

Status



Date modified

3/23/2020 6:06 AM

Type

Microsoft Word D...

Size

17 KB

The SharePoint folder structure and files are exactly the same as the newly created Company folder in OneDrive Client. Note the Cloud above indicates a file that has not yet been downloaded. It is critical to access large files for the first time from a good internet connection.



# My Drive & Shared Drives

- Solve Local File Share Access
- Collaboration for Teams and Departments
- Mobile Applications

New

My Drive

My Drive

Board Survey

President

Rocketbook

Shared with me

Recent

Starred

Trash

Storage

377.3 MB of 15 GB used

Buy storage

My Drive

Quick Access

Board Self-Evaluation

ECCA Board Self-Evaluation - CDE...

You edited in the past year

2.13.20Board Meeting Feedback ...

You uploaded in the past month

Eagle County Charter Academy

2020.03.12 Agenda.docx

You uploaded in the past month

Name	Owner	Last modified	File size
Rocketbook	me	Dec 2, 2018	—
President	me	Oct 11, 2018	—
Board Survey	me	Dec 10, 2019	—
Resolution_Accept_Auditors.pdf	me	Jun 2, 2019	7 KB
Getting started	me	Aug 29, 2018	1 MB
ECCA Board Res Proposed Budge	me	Jun 2, 2019	86 KB

Get notifications on your computer for shared files and important events.

TURN ON

My Drive offers folder structure on line, Quick Access for regularly accessed files, and the power of Google's search functions. Don't forget to turn on notifications for critical files!

# Video Conferencing

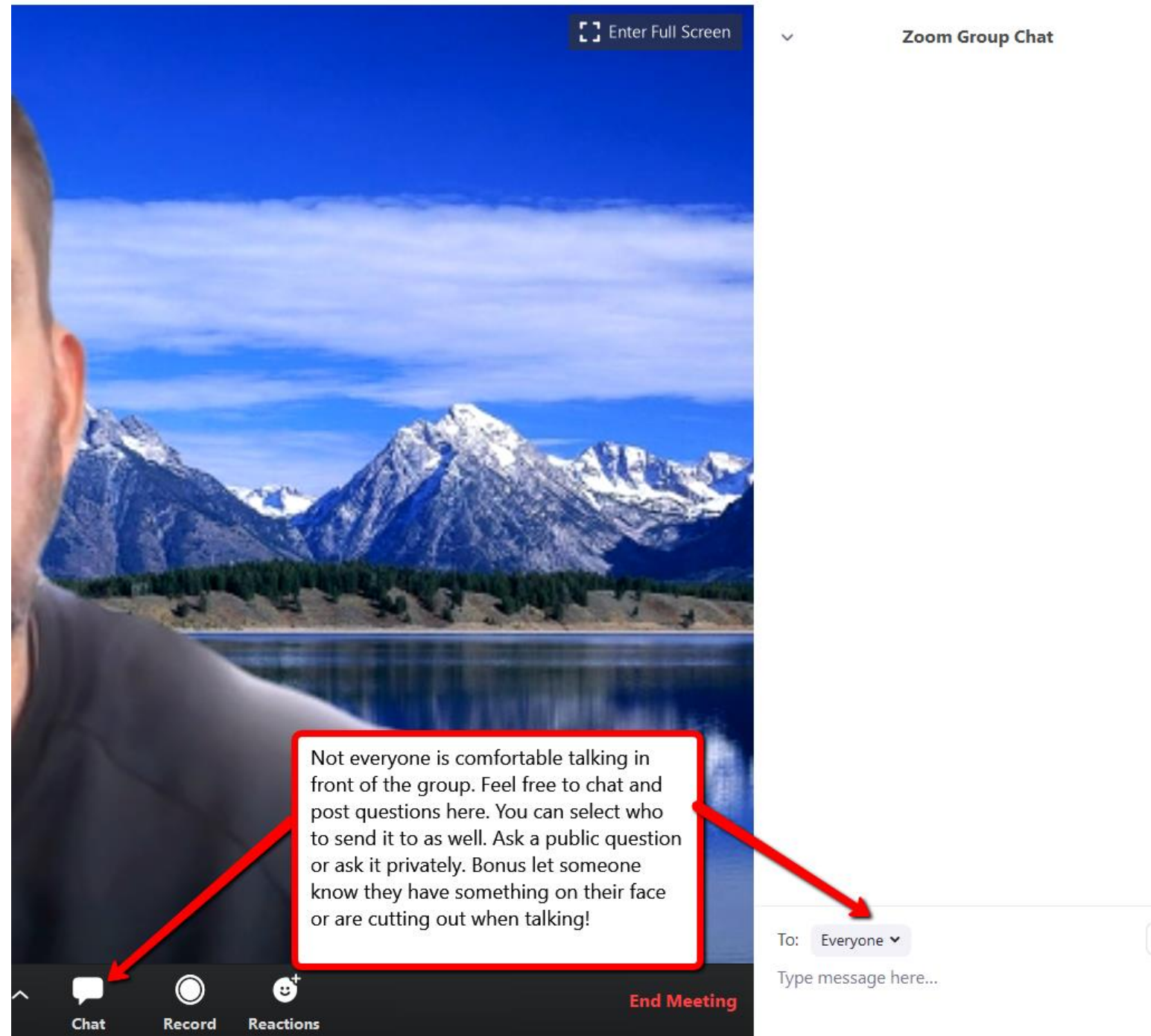
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VIDEO CALLS, MEETINGS, SCREENSHARING



zoom

Everyone can  
have a voice:  
Even if you don't  
want to talk



# Legacy Application Access



Remote Desktop



Virtual Desktop Infrastructure  
(VDI)



Microsoft Azure

Paper is the  
enemy

- Bluebeam
- Adobe
- Dropbox for Business

Jeff Sample

eSUB Construction Software

jeffs@esub.com

eSUB.com

@IronmanofIT

@eSUBConstructionSoftware





**Q & A**

**Thank You**

# Extra Resources

# Links and Resources

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- [eSUB COVID Preparedness Kit](#)
- [CDC COVID-19 Information](#)
- [CDC Guidance for Businesses](#)
- [OSHA 3990 Guidance on Preparing Workplaces for COVID-19](#)
- [Worldwide Health Organization \(WHO\) – COVID-19 Information](#)
- [Coronavirus COVID-19 Global Cases Map/Count - John Hopkins University](#)
- [Employment Law COVID-19 FAQ \(Wilmer Hale\)](#)

# Communication Plan

Examples for  
Redistribution

# Company Operations Tiers



## Tier 1 – Normal Operations



## Tier 2 – Abundance of Caution

No business travel to high-risk areas  
Enforce adherence to sick leave / work from home guidance  
Personal travel to high-risk areas must be followed by 14 days of self-quarantine  
For the next 8 weeks, no conference attendance



## Tier 3 – Minimize Exposure

Essential business travel only (CEO must approve)  
Personal attendance at large public gatherings must be followed by 14 days of self-quarantine (ex: foreign & domestic travel, amusement parks, sporting events, 500+ attendees)  
Individuals at high risk or with family members at high risk may work from home after working out a plan with your manager's approval  
No conference attendance



## Tier 4 – Community Containment

Everyone works from home  
No business travel

# COVID -19 Timeline

## – A Case Study

---

- Wed 3/4 – CEO participated in national high-level executive briefing
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# Employee Operations

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- Work remote whenever possible
- States are beginning to forbid onsite operations
- At a minimum employees need to remain 6ft apart
- Restrict access to employees only when remote work is not possible
  - No vendors
  - No family
  - Etc.
- When outside access is required follow these questions
  - Do you have symptoms of respiratory illness?
  - Do you have reason to believe you've been exposed to COVID19?
  - Have you been abroad in the last 14 days?



# In Office Guidelines

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- Laptops and essential equipment should be taken home daily
  - Essential equipment examples – power supplies, headsets for heavy phone users
- Observe proper hygiene
  - Wash hands often with soap and water for at least 20 seconds
  - If soap and water are not available use an alcohol-based hand sanitizer (60%+)
  - Avoid touching eyes, nose, and mouth
  - Sneeze and cough into a tissue or your elbow
  - Dispose of used tissues, paper towels appropriately
  - Disinfect frequently used surfaces daily
  - Dishes eliminated from office – move to paper and plastic
- Switch from handshakes to the elbow or foot bump
- Work remote
- Provide prepackaged individual meals
- Prepare for 25% of workers to be unavailable

# When NOT to come into the Office/Jobsite

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- Fever at or above 100°F / 37.8°C
- Respiratory symptoms – difficulty breathing
- Severe productive cough not due to a long-standing medical issue
- Shortness of breath
- Exposure to someone who has been exposed to COVID – 19
- Exposure to someone who has recently returned from international travel

# Travel Policy Changes

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- No business travel to high-risk areas (CDC defined areas as areas 2 or 3 <https://www.cdc.gov/coronavirus/2019-ncov/travelers/index.html>)
- Only essential business travel permitted
- All travel must be approved by CEO
- If the employee or someone they live with has travelled to a high-risk area, the employee should self-quarantine at home for 14 days
- Countries closing borders
- Travel is not the problem it is the destination
- The US Government cannot guarantee return from abroad
- No current Domestic travel Bans
- Critical business travelers suggest 14-day quarantine

# Supply Chain Disruption

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- Plan for and prepare for Supply chain disruption
  - Inventory current supplies
  - Contact Vendors to secure information on availability of supplies in the US
- People who transport and frequently interact with people and surfaces are likely to become ill
- Ports implementing tighter restrictions on overseas goods
- Have a backup plan for local alternative sources or fabrication where possible

# 4 Phases of Government Action

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- **Phase 1** Already Enacted
  - Provides direct aid to people fighting the spread of the virus
  - Contact Vendors to secure information on availability of supplies in the US
- **Phase 2** in effect as of 3/20/2020
  - Free COVID19 testing even if insurance does not cover it
  - Basic Subsistence Aid for individuals who cannot cover the cost of necessities'
  - FAMILY LEAVE: Private sector employers with fewer than 500 workers have to provide as many as 12 weeks of job-protected leave under the Family and Medical Leave Act (FMLA) for qualifying employees
  - SICK LEAVE: If a full time employee is sick with COVID-19 or a family member has it and they are all under mandatory quarantine, they are required to get: 80 hours of sick leave, with part time workers receiving paid leave equivalent to their normal work schedule (someone averages 10 hours of work a week has to get 10 hours a week paid leave). Employees must be paid their full wage during that time.
  - To help employers pay for these family and sick leave programs, the government is giving employers a credit against the payroll tax
- **Phase 3** of government action will include broader economic measures to bail out hard hit industries and provide support for continued business operations. It is speculative at this point and likely to change in the coming weeks as a result of partisan divisions and resulting negotiations, but Congress is aiming to pass legislation by April 1st.
- **Phase 4** will come at a later date when the federal government likely realizes that all of the above has not done enough to support economic recovery. It is harder to predict what this relief might look like at this stage.

# Economic Reality

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- This is a Financial Crisis not an economic crisis.
- Credit is still flowing.
- Markets, though down, are functioning and many businesses are reporting favorable reactions to loan and rent forbearance.
- If this gets long or bad enough, that could change, but for now everyone seems to want to assist each other in getting through this pandemic.

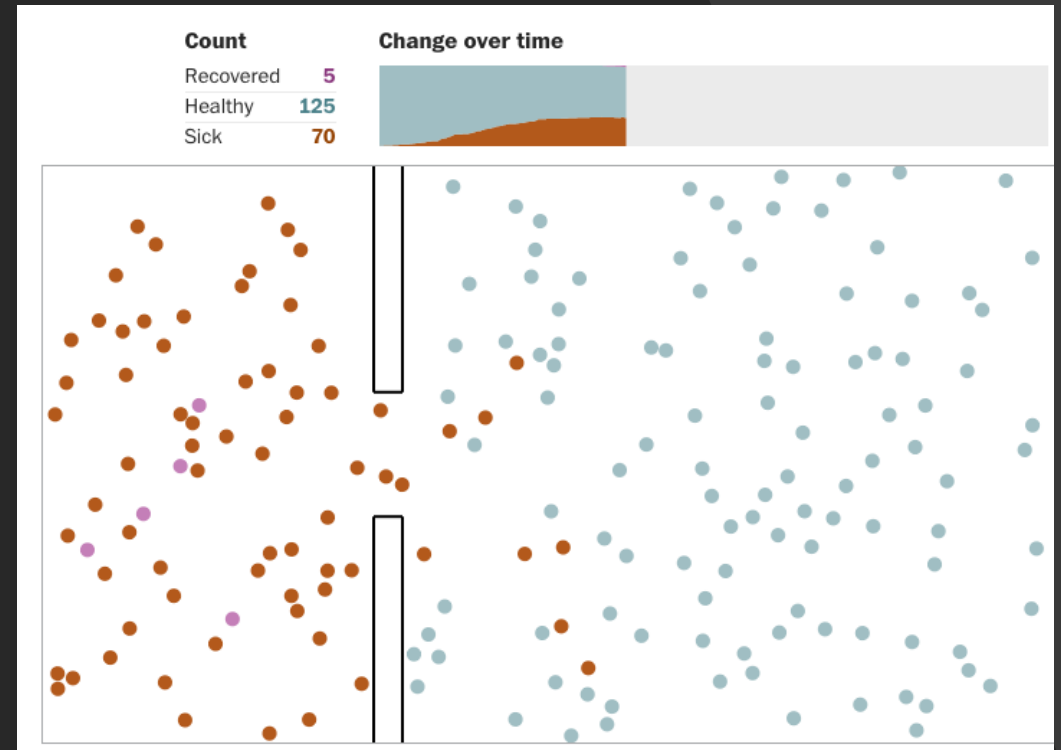
# Social Reality

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- Extended School Closures are a reality. Likely the remainder of the year.
- Ecommerce emerging as the clear winner.
  - With forced retail closures, consumers are being driven to online purchasing.
  - As consumers become comfortable with online purchasing, Brick & Mortar retail will continue to undergo disruption.
- Remote work practices is likely to have an impact on the practicality of large office spaces.
- Video conferencing abilities are likely to impact business travel policies and the travel industry.
- The global pandemic will have a positive impact on general hygiene, emergency preparedness, and public health measures driving new business innovation opportunities.

# Leadership

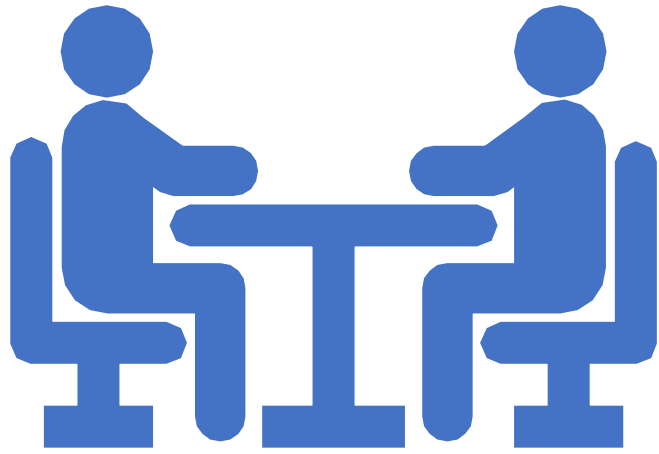
- **Communication**
- **General Safety & Social Distancing**  
[Washington Post article](#) demonstrates the power of social distancing.
- **Stress Mitigation**
- **Jobsite Safety**





# Communication

Single Source of Truth



## Create a Communication Team and Hub

1. No more than 3-5 people - leadership team/corporate communications/ HR executive
2. Meet regularly to monitor situation as it evolves
3. Main source of information about the crisis
4. Regular updates to team-Daily

Transparent-what you know, what you don't know, and your sources of information

Succinct-explain in clear language, not lawyer speak

# Company Operations Tiers



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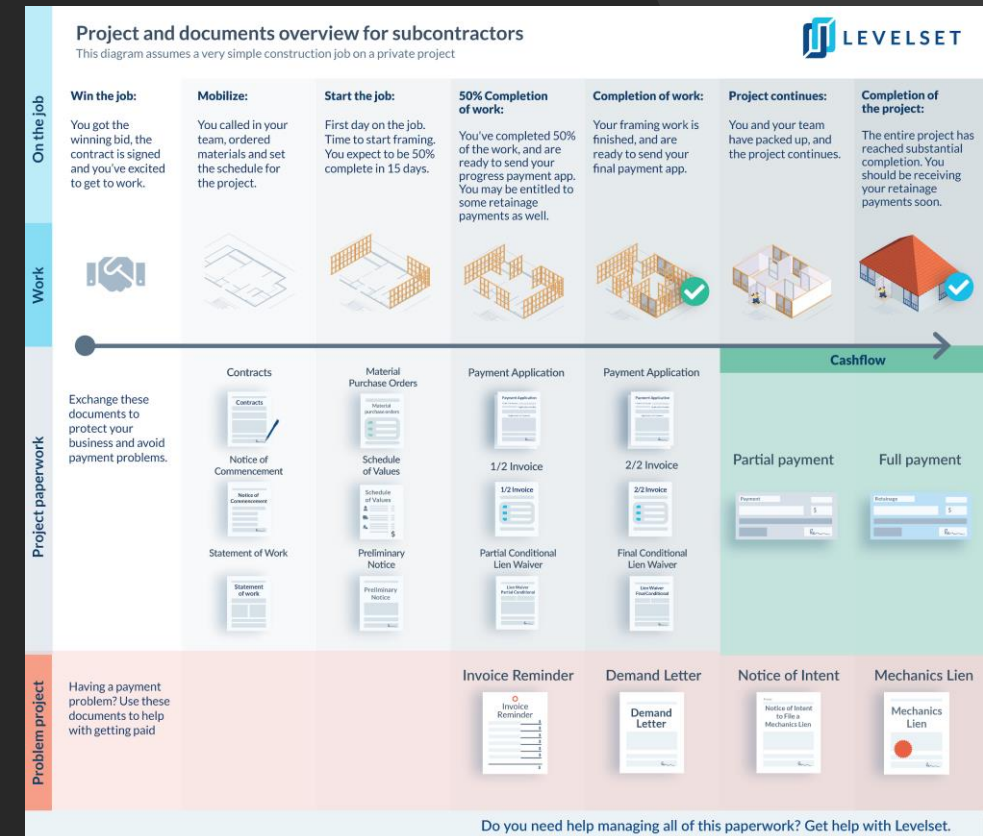
# Project Controls

Everyday you leave  
could be your last for a  
while

# Documentation is critical

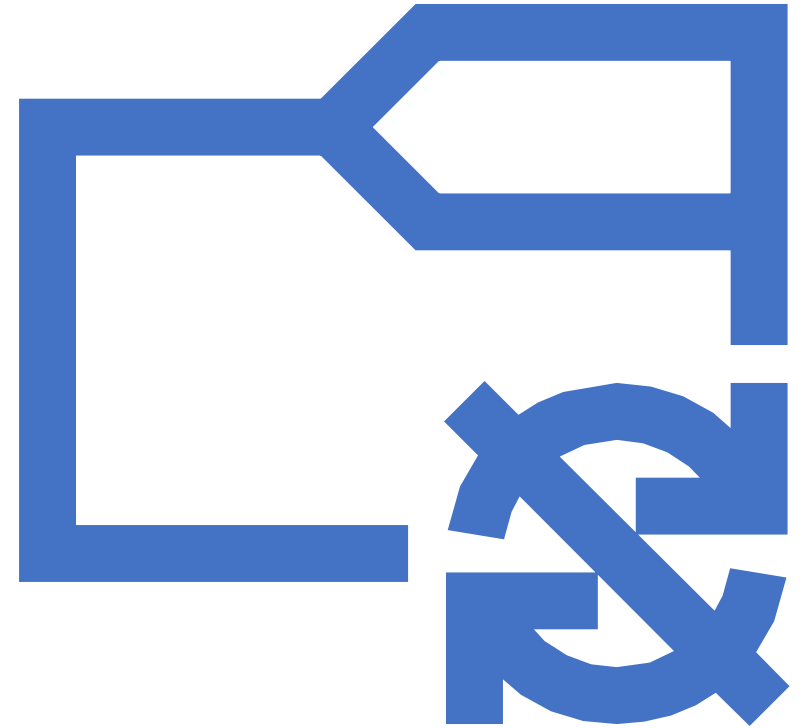
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- Real time Information
- Stored in the Cloud



A Digital Workspace

# Remote Tools



# The Challenges

- Office Communication
  - Face to Face
  - Meetings
  - Email
- Files Stored on Internal Servers
- Legacy Applications

# Office 365



**Teams**



**One Drive**



**Sharepoint**



**Applications**

Excel, Word, PowerPoint

OneNote, Tasks, To Do

Planner, Power Automate



# Portal.Office.com -- Myapps.Microsoft.com

Office 365 All Apps Tips and Tricks

Add-Ins →



**Bookings**  
Online appointment scheduling fo...



**Calendar**  
Schedule and share meeting and e...



**Delve**  
Get personal insights and relevant...



**Dynamics 365**  
Break down the silos between you...



**Excel**  
Discover and connect to data, mo...



**Forms**  
Create surveys, quizzes, and polls ...



**Kaizala**  
A simple and secure mobile chat a...



**MyAnalytics**  
Create better work habits with insi...



**OneDrive**  
Store, access, and share your files i...



**OneNote**  
Capture and organize your notes a...



**Outlook**  
Business-class email through a ric...



**People**  
Organize your contact info for all ...



**Planner**  
Create plans, organize and assign ...



**Power Apps**  
Build mobile and web apps with th...



**Power Automate**  
Create workflows between your ap...



**Power BI**  
Create actionable, dynamic, and e...



**PowerPoint**  
Design professional presentations.



**SharePoint**  
Share and manage content, knowl...



**Stream**  
Share videos of classes, meetings, ...



**Sway**  
Create and share interactive repor...



**Tasks**  
Create and manage tasks in Outlo...



**Teams**  
The customizable, chat-based tea...



**To Do**  
Manage, prioritize, and complete t...



**Whiteboard**  
Ideate and collaborate on a freefo...



**Word**  
Bring out your best writing.



**Yammer**  
Connect with coworkers and class...

# Teams

- Messaging
- Video Chat
- Screen Sharing
- Meetings
- Mobile

Microsoft Teams interface showing chat and call functionality.

**Left Sidebar:**

- Activity
- Chat
- Teams
- Calendar
- Calls
- Files
- ...
- Apps

**Chat List (Recent):**

- New chat
- Benny Baltrosky 12:52 PM  
lol
- David Gabbart 12/6  
You: Hey buddy- How is life in Sa...
- Adam Holden 11/7  
You: Great meeting you!! Keep up ...

**Suggested:**

- Cody Riddar
- Gabe Rubin
- Jared Mugar
- Justin Wetherby
- Nathan Stickman
- Patty Bustamante
- Wendy Rogers

**Chat Window (Benny Baltrosky):**

Search or type a command

Chat Files Organization 1 more +

Benny Baltrosky 12:52 PM  
Don't do it

lol

★★★★☆ How was the call quality?

**Call Controls:**

- Video Calls- Works from Android and iPhone with App
- Voice Calls- Works from Android and iPhone with App
- Instant Screen Sharing  
\*\*Excellent for remotely working through software issues\*\*

**Chat functions!**

Activity

Chat

Teams

Calendar

Calls

Files

...

Apps

Chat

Recent

Contacts

To: Enter name, email, group or tag

New chat

David Gabbart

12/6

You: Hey buddy- How is life in Sa...

Adam Holden

11/7

You: Great meeting you!! Keep up ...

Suggested

Cody Riddar

Gabe Rubin

Jared Mugar

JW

Justin Wetherby

NS

Nathan Stickman

Patty Bustamante

WR

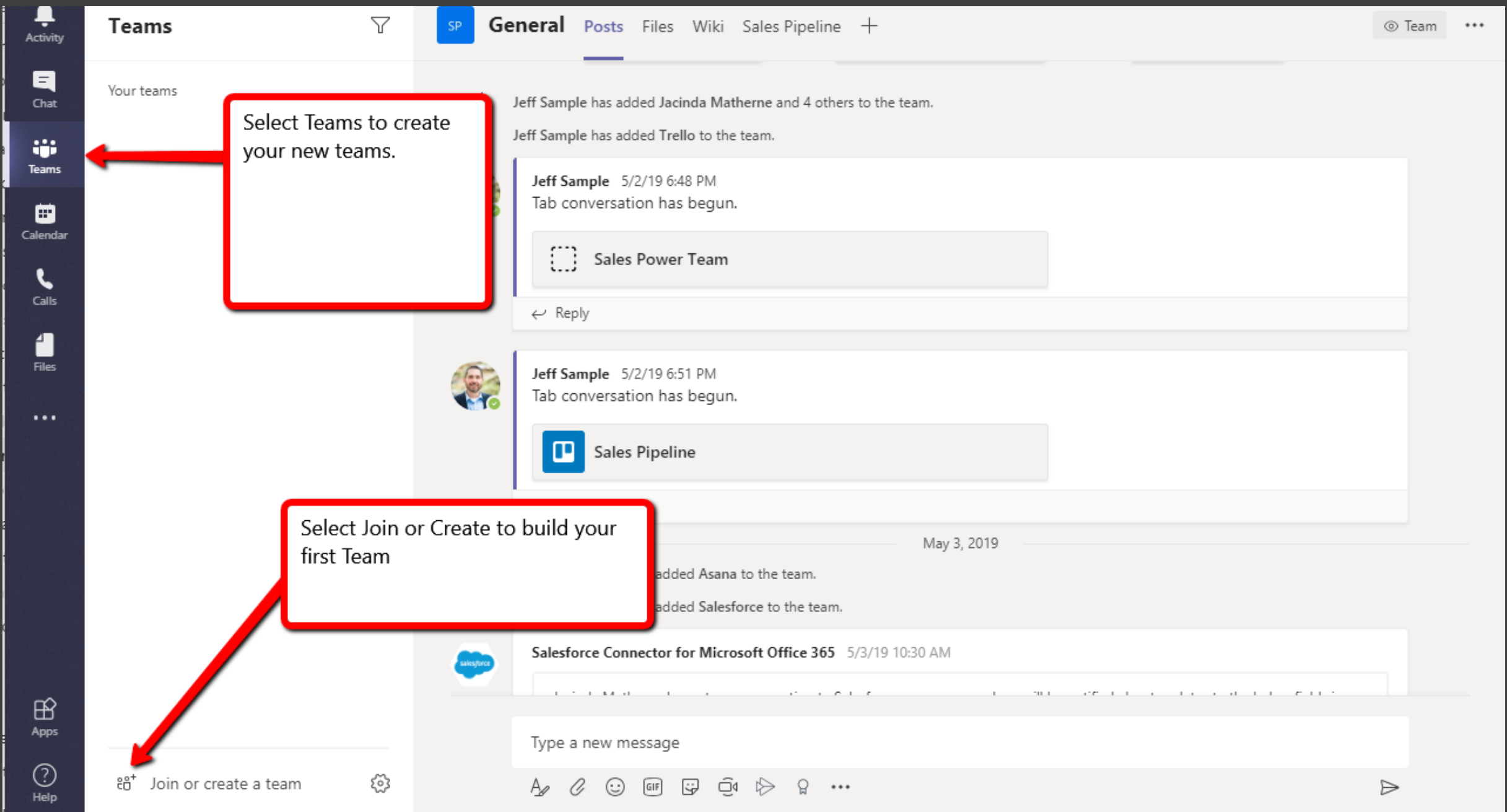
Wendy Rogers

Type a new message

Search or type a command

Chat Directly with Anyone in your Organization. Suggestions will pop up but if they aren't there select New Chat and start typing their names!

Create Teams to connect your new remote teams easily to one another and have ongoing discussions related to specific Projects, departments, or groups. This includes Company Wide teams for Critical Communications.



Select Teams to create your new teams.

Select Join or Create to build your first Team

Activity

Chat

Teams

Calendar

Calls

Files

...

Apps

Help

Teams

Join or create a team

Search teams

Your teams

Create a team

Bring everyone together and get to work!

Join a team with a code

Enter code

Got a code to join a team? Enter it above.

eSUB-All

Public

eSUB-All

Create your own teams--  
\*\*\*Tutorial Assumes You Selected  
this button\*\*\*

Join another Organizations  
Team--Possibly a GC System

Already created Teams  
you are open to Join

Join or create a team

## What kind of team will this be?



### Private

People need permission to join



### Public

Anyone in your org can join

Self Explanatory

\*\*\*Path of Creating your Own Team  
from Scratch\*\*\*\*\*

< Back

## Create your team



**Build a team from scratch**

Most People will start here for custom Teams



**Create from...**

An existing Office 365 group or team

This accesses your Microsoft Domain or Azure AD Groups. Requires advance setup but might exist!

[What's a team?](#)

## Some quick details about your private team ×

Team name

**University Hospital Project** ✓

Description

Let people know what this team is all about

Name it, describe  
it, & Create It

[< Back](#)

Create



Nice work!



## Add members to University Hospital Project

Start typing a name, distribution list, or mail enabled security group to add to your team.

Start typing a name or group

Add

Type Names and add members. These can be adjusted later.

Skip

## Add members to University Hospital Project

Start typing a name, distribution list, or mail enabled security group to add to your team.

Start typing a name or group

Add



Benny Baltrotsky  
(BENNY) Chief Strategy Officer

Member ▾



When adding members the privileges can be changed Member or Owner. Owners can add and remove members. This can be changed but having multiple owners will help in getting team members added without delay.

Close

## Teams



UH

General

Posts

Files

Wiki



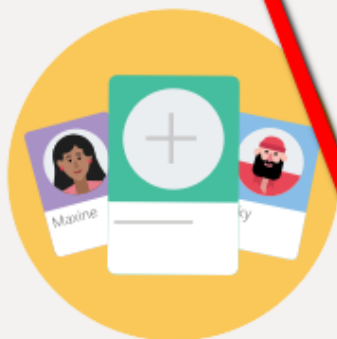
Team



Your teams

## Welcome to the team!

Here are some things to get going...



Add more people



Create more channels



Open the FAQ



Jeff Sample has added Benny Baltrosky to the team.

Start talking to the team! Share files (Sharepoint in the background).

Start a new conversation. Type @ to mention someone.



# OneDrive

- Solve Local File “My Documents” issues
- Mobility with Cloud storage
- Mobile Application



OneDrive

Search everything

+ New ▾ ↑ Upload ▾ ↻ Sync ⌵ Flow ▾

Jeff Sample

My files

Recent

Shared

Discover

Recycle bin

Shared libraries

Thought Leadership

Events & Trade Shows

Consulting

eSUB Inc. Team Site

University Hospital Project

University Hospital Project

eSUB Integration


















Sales Power Team

[Create shared library](#)

[Get the OneDrive apps](#)

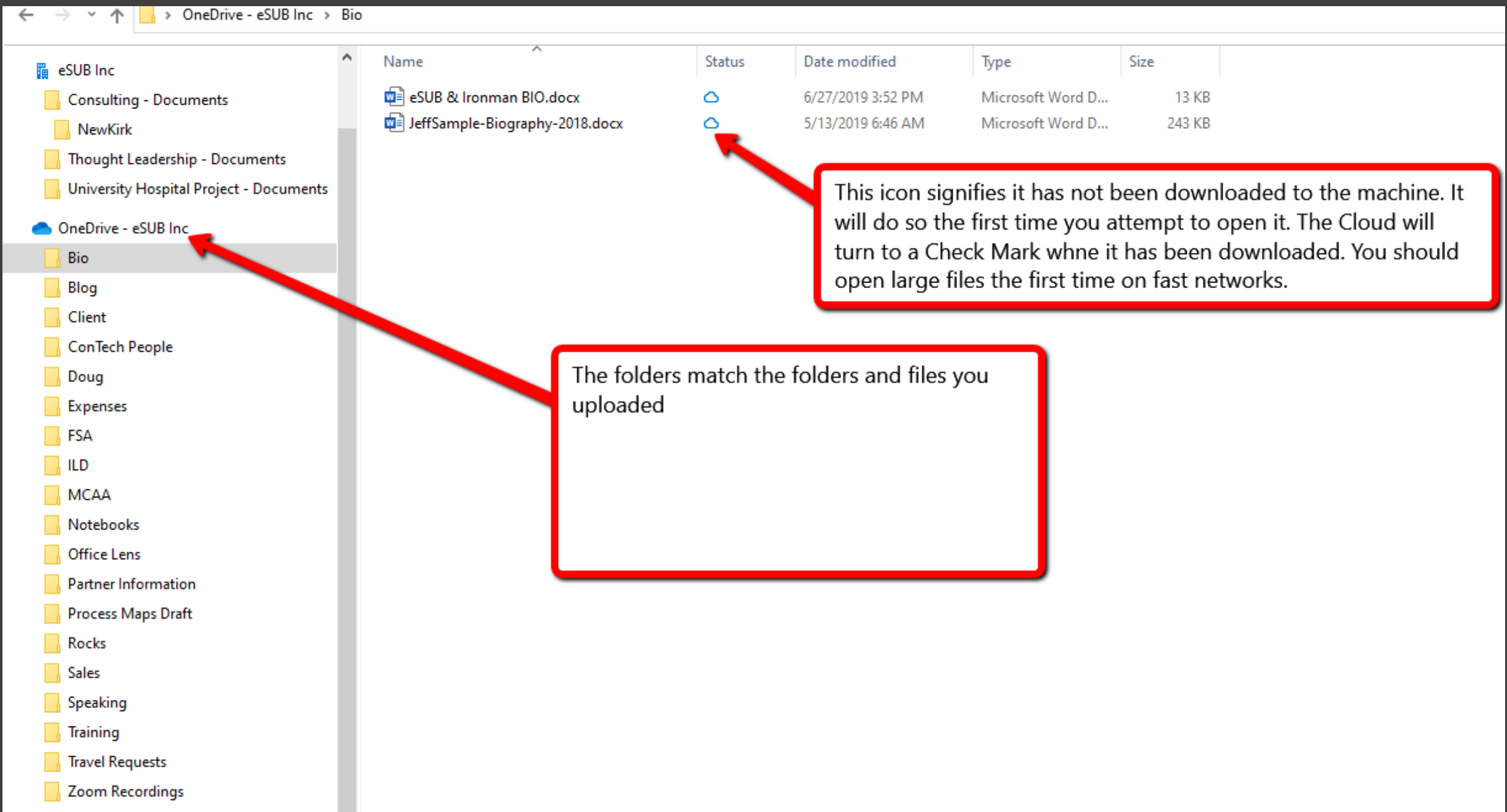
[Return to classic OneDrive](#)

## Files

 Name ▾	Modified ▾	Modified By ▾	File Size ▾	Sharing	Activity
 Bio	June 27, 2019	Jeff Sample	2 items	Private	
 Blog	June 10, 2019	Jeff Sample	3 items	Private	
 Client	September 27, 2019	Jeff Sample	2 items	Private	
 ConTech People	July 2, 2019	Jeff Sample	1 item	Private	
 Doug	May 10, 2019	Jeff Sample	2 items	Private	
 Expenses	April 26, 2019	Jeff Sample	19 items	Private	
 FSA	December 30, 2019	Jeff Sample	5 items	Private	
 ILD	May 14, 2019	Jeff Sample	5 items	Private	
 MCAA	January 13	Jeff Sample	3 items	Private	
 Notebooks	April 23, 2019	Jeff Sample	1 item	Private	
 Office Lens	July 11, 2019	Jeff Sample	10 items	Private	
 Partner Information	May 2, 2019	Jeff Sample	1 item	Private	
 Process Maps Draft	May 30, 2019	Jeff Sample	7 items	Private	
 Rocks	January 9	Jeff Sample	9 items	Private	
 Sales	December 13, 2019	Jeff Sample	4 items	Private	
 Speaking	May 13, 2019	Jeff Sample	7 items	Private	

Upload your My Documents Folder

Click Sync



OneDrive - eSUB Inc > Bio

- eSUB Inc
  - Consulting - Documents
  - NewKirk
  - Thought Leadership - Documents
  - University Hospital Project - Documents
  - OneDrive - eSUB Inc
    - Bio
    - Blog
    - Client
    - ConTech People
    - Doug
    - Expenses
    - FSA
    - ILD
    - MCAA
    - Notebooks
    - Office Lens
    - Partner Information
    - Process Maps Draft
    - Rocks
    - Sales
    - Speaking
    - Training
    - Travel Requests
    - Zoom Recordings

Name	Status	Date modified	Type	Size
eSUB & Ironman BIO.docx		6/27/2019 3:52 PM	Microsoft Word D...	13 KB
JeffSample-Biography-2018.docx		5/13/2019 6:46 AM	Microsoft Word D...	243 KB

This icon signifies it has not been downloaded to the machine. It will do so the first time you attempt to open it. The Cloud will turn to a Check Mark when it has been downloaded. You should open large files the first time on fast networks.

The folders match the folders and files you uploaded

# Sharepoint

- Solve Local File Share Access
- Collaboration for Teams and Departments
- Mobile Application

Start a new Team/  
Project Specific  
Site

## News from sites



### News from sites

Here you'll see news from sites you follow or visit frequently and other news suggested by the Microsoft Graph.



Outlook Customer Manager

### New Roadshow Google Map



Jacinda Matherne  
4/3/2019



## Sites

Recent

Following

Frequent

Suggested



Thought Leadership  
Group



Events & Trade Shows  
Group



Outlook Customer Manager  
Group



Consulting  
Group



eSUB Inc. Team Site



## Create a site

Choose the type of site you'd like to create.



### Team site

Share documents, have conversations with your team, keep track of events, manage tasks, and more with a site connected to an Office 365 group.

Create a Team Site for your individual teams or projects.  
Example- Estimating Team  
University Hospital Team



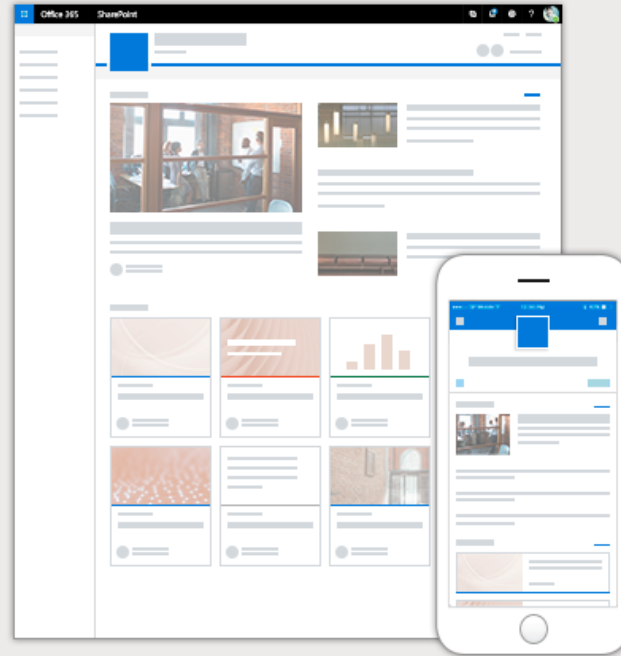
### Communication site

Publish dynamic, beautiful content to people in your organization to keep them informed and engaged on topics, events, or projects.



## Get a team site connected to Office 365 Groups

Use this design to collaborate with your team. Share documents, track events in a shared calendar, and manage project tasks.



Set the site to Public or Private. Mainly used as private access.  
\*\*Public Groups are great for forms etc.\*\*

Name and describe your site.

Site name

Estimating

The site name is available.

Group email address

Estimating

Estimating@esub.com

The group alias is available.

Site address

https://esub.sharepoint.com/sites/Estimating

The site address is available.

Site description

Current Estimating Projects for Remote Use

Privacy settings

Private - only members can access this site

Select a language

English

Select the default site language for your site. You can't change this later.

Next

Cancel

## Add group members

Group members will receive an email welcoming them to the new site and Office 365 group

Owners can make the changes necessary for adding members - Always designate multiple owners close to the team to prevent delays in access. Can be adjusted later.



Department Team Members.  
Can be adjusted later

E

Estimating  
Private group

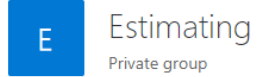
Who do you want to add?

You can also add more people later

Add additional owners

Add members

Finish




Estimating

Private group

Your new site! Not quite  
done yet

★ Following

3 members

 Search this site[+ New](#)  Page details

Published

 Edit

Home

Conversations

Documents

Notebook

Pages

Site contents

Recycle bin

Edit

News

[+ Add](#)

Click here to begin  
adding files.





Keep your team updated with news on your  
team site




From the site home page you'll be able to quickly author  
a news post – a status update, trip report, or even just h...

[Add News](#)

Quick links

 [Learn about a team site](#) [Learn how to add a page](#)

Documents


[See all](#)[+ New](#)  All Documents Name 

Modif



Drag files here

 Microsoft Teams

Communicate with your  
colleagues in real time by  
creating a Team for your  
Office 365 Group. 

[Create a Team](#)

The new Estimating group is  
ready

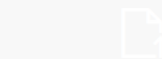
Welcome to the Estimating group.  
Use the group to share ideas, files,  
and important dates. Start a



Estimating +1  
Sent 4 minutes ago




Jeff Sample  
Created site 4 minutes ago



View and share files

Collaborate on content with your  
team.

 Upload a document[Get the mobile app](#)



Search

[+ New](#) [↑ Upload](#) [Quick edit](#) [Sync](#) [Export to Excel](#) [PowerApps](#) [Flow](#) [...](#)[All Documents](#) [Filter](#) [Info](#) [Link](#)

Home

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

Recycle bin

[Edit](#)

## Documents

Name	Modified	Modified By	+ Add column
------	----------	-------------	--------------

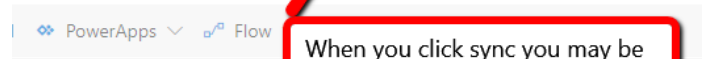
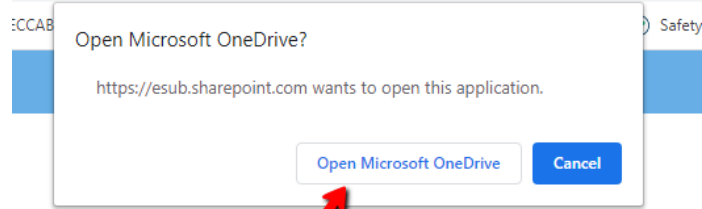
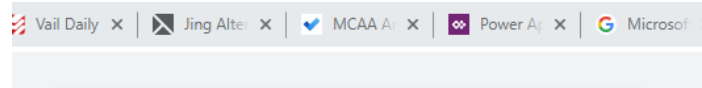
Once the critical files have been uploaded. Access the site from each team members computer and click sync. This will create a copy of the file and folder structure locally on the computer and assist in accessing files through file explorer. This is not the full download of each file. That happens the first time you access the files. \*\*\*Warning\*\*\* Certain large files and file types have issues and can present difficulties. Contact support for your software or seek advice for specific file types.

Drag files here

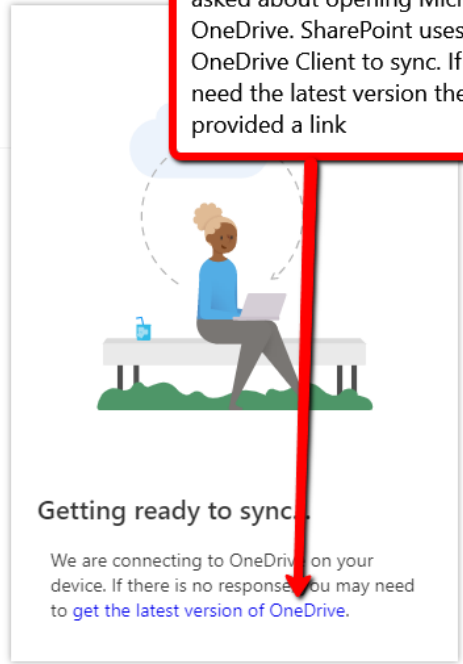
Microsoft Teams

Communicate with your colleagues in real time by creating a Team for your Office 365 Group.

[Create a Team](#)[Return to classic SharePoint](#)



When you click sync you may be asked about opening Microsoft OneDrive. SharePoint uses the OneDrive Client to sync. If you need the latest version they have provided a link



Bids

File Home Share View

← → ↕ ↑ > eSUB Inc > Estimating - Documents > Bids

> Quick access

> Dropbox

▼ eSUB Inc

> Consulting - Documents

▼ Estimating - Documents

Bids

> Sales Power Team - Documents

> Thought Leadership - Documents

Name

Document.docx

Status



Date modified

3/23/2020 6:06 AM

Type

Microsoft Word D...

Size

17 KB

The SharePoint folder structure and files are exactly the same as the newly created Company folder in OneDrive Client. Note the Cloud above indicates a file that has not yet been downloaded. It is critical to access large files for the first time from a good internet connection.



# Applications

- Core Productivity – Provide 5 installs per person including Mobile. Also available as online tools
  - Excel
  - Word
  - PowerPoint
- OneNote, Tasks, To Do
- Delve
- Planner, Power Automate – When you take a breath

# GSuite



## Communication Suite

Slack  
Hangouts  
•Chat  
•Meet



## My Drive



## Shared Drives



## Applications Docs, Sheets, Slides, Keep, Apps Script



# GSuite.Google.com

---



EMAIL



HANGOUTS



CALENDAR



GOOGLE+



DRIVE



DOCS



SHEETS



FORMS



SLIDES



SITES



ADMIN



eDISCOVERY

New

My Drive

My Drive

Board Survey

President

Rocketbook

Shared with me

Recent

Starred

Trash

Storage

377.3 MB of 15 GB used

Buy storage

My Drive

Quick Access

Board Self-Evaluation

ECCA Board Self-Evaluation - CDE...

You edited in the past year

2.13.20Board Meeting Feedback ...

You uploaded in the past month

Eagle County Charter Academy

2020.03.12 Agenda.docx

You uploaded in the past month

Name	Owner	Last modified	File size
Rocketbook	me	Dec 2, 2018	—
President	me	Oct 11, 2018	—
Board Survey	me	Dec 10, 2019	—
Resolution_Accept_Auditors.pdf	me	Jun 2, 2019	7 KB
Getting started	me	Aug 29, 2018	1 MB
ECCA Board Res Proposed Budge	me	Jun 2, 2019	86 KB

Get notifications on your computer for shared files and important events.

TURN ON

My Drive offers folder structure on line, Quick Access for regularly accessed files, and the power of Google's search functions. Don't forget to turn on notifications for critical files!

GSuite.Google.com

- All remote No Installation required
- Android & iPhone apps free

# Hangouts

- Messaging
- Video Calls
- Meetings
- Screensharing
- Mobile



New conversation

Start a new Conversation  
from your contacts.



No recent chats  
[Start a new one](#)

# Hi, Jeff!

Get started by calling or messaging a friend below.



VIDEO CALL



PHONE CALL



MESSAGE

Everything at your finger tips for phone, video, and  
messaging.



Photo by Brian Matiash

# Slack

- Messaging
- Video Calls
- Meetings
- Screensharing
- Mobile





Slack | Samantha Jandrisch | eSUB

**eSUB** ▾  
Jeff Sample

Jump to... < >  
# xconbluebeam

**Direct Messages** +

- Slackbot
- Jeff Sample (you)
- Benny Baltrosky, Jenny ...
- Benny Baltrosky, Matt B...
- Benny Baltrosky, Wend...
- Brianna Maczko, Samant...
- Catherine Gutmanis-Buri...
- Catherine Gutmanis-Buri...
- Craig Wren
- David Gabbart
- Deak Hansen
- Erin Davon
- Jaci
- Jenr
- Jenr
- Kati
- Mat
- Sam
- Sharon Weldon

+ Invite people

**Samantha Jandrisch**  
★ | notifications snoozed | Samm J.

Friday, March 20th

Call Ended  
Ended at 4:15 PM - Lasted 13 minutes

You both joined

Yesterday

view for tomorrow? just wanna get my intro slides ready in

Is first thing in the morning or late tonight ok? Been trying to deal with kids.

**Samantha Jandrisch** 6:20 PM  
Whichever works best for you just wanted to get them before you start your webinar jam packed day

**Jeff Sample** 6:32 PM  
Totally understand. Trying to focus when possible but hasn't been easy

...e it easier!!

...th 2 kids Social Distancing.

Message Samantha Jandrisch

📎 B I ↺ </> 🔗 ☰ ☷ ☹ 🗑

Aa @ 😊

When you are in a direct message you can call that person or the entire group by clicking the phone button. To share screens you must first be on a call with them.

Direct Message or start a new chat. These can be one to one or you can create groups on the fly. When you click the plus a Window opens to add members. (see next slide)

Slack is great for external communications and groups. See the list on the left of the other Slack Groups you have joined. Access them directly from here. Notice the white circle in the corner signifying activity in the group.



## Direct Messages



Samantha Jandrisch ✕



Brianna Maczko ✕

Go

You can add 6 more people



Looking for someone but can't remember their name? Switch to search to find people based on title, profile info, or topics they talk about. [Search for people](#)

### Recent conversations



Wendy Rogers ○

3 days ago



Benny Baltrotsky ○ BennyB

3 days ago



Jenny Clavero ○ Jenny Clavero

3 days ago



David Gabbart □

3 days ago



Outlook Calendar ● APP

3 days ago

Type names in the window and select them from below to start individual or group chats. It will learn and recommend your frequent contacts.

# DIRECT MESSAGE SLACK CALL

## From a direct message

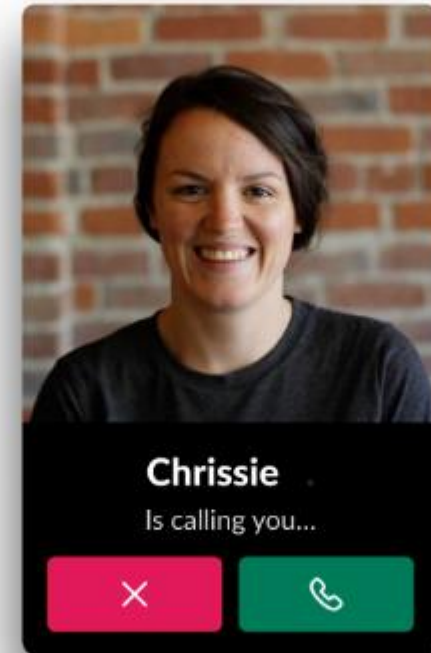
- 1 Open a direct message.
- 2 Click the 📞 **phone icon** at the top right.
- 3 Your call will start right away, and the member you're calling will receive a pop-up notification.

You can also click the 📹 **camera icon** to start a video call and [share your screen](#) if your workspace is on a paid plan.



**Note:** If using [Do Not Disturb](#), the member you're calling will see a missed call notification in a direct message.

When another member calls you in a one-to-one or group DM, you'll see a pop-up call notification. Click the green 📞 **phone icon** to answer the call.



# CHANNEL SLACK CALL

## From a channel

- 1 Open a channel and click the 📞 **phone icon** at the top right.
- 2 Your call will post to the channel and any member (up to 15 total) can join by clicking **Join this call**.

You can also click the 📷 **camera icon** to start a video call and [share your screen](#) if your workspace is on a paid plan.

When you start a call in a channel with more than 100 members, Slack will confirm this is the action you want to perform before the call starts.

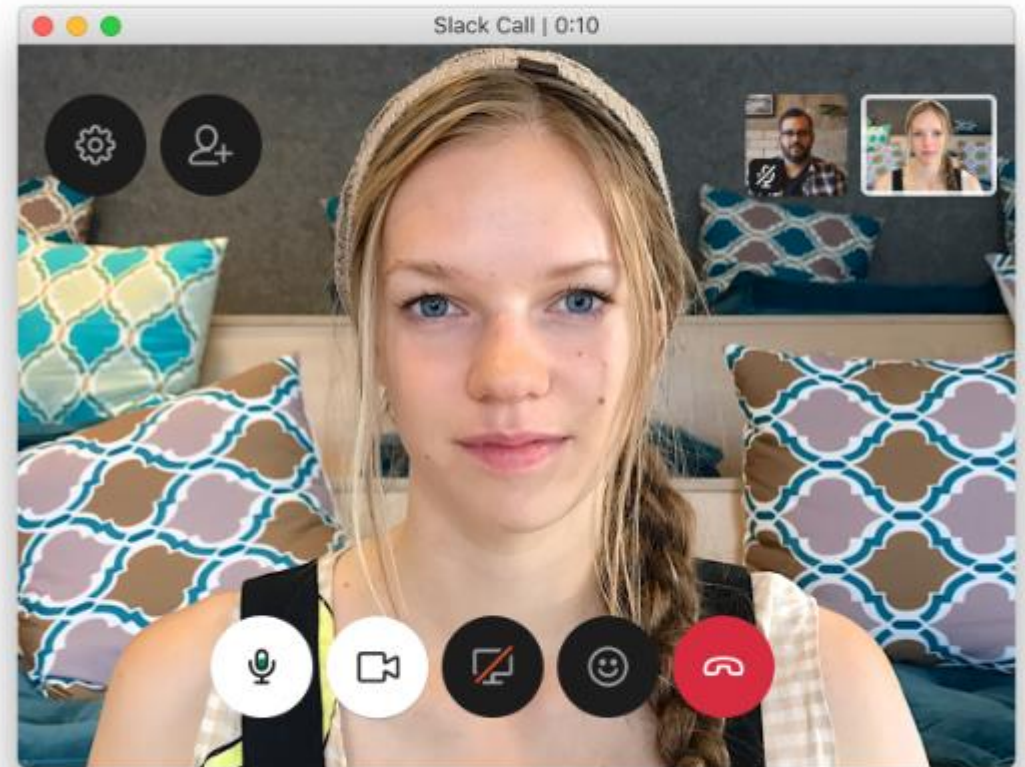


**Tip:** Use an [@here](#) or [@channel mention](#) to notify channel members before or after you start the call.



**Note:** Need a shortcut for making calls? We've got a slash command for that! Use `/call` in a DM or channel to start a call.


Click **Join this call** from the in-channel invitation. A call window will open where you can see who else is on the call, and who is speaking.




# INVITING TO A SLACK CALL/SCREEN DRAWING

## Invite other members to a call



To invite a specific member to join your current call, follow these steps:

- 1 Click the  **invite icon** in the upper-right corner of the call window.
- 2 Start typing a member's name to filter the list.
- 3 Select a member to invite.

If you'd like to share a call in other channels, here's how:

- 1 Click the  **invite icon** in the upper-right corner of the call window.
- 2 Click **Share this call**.
- 3 Click **Copy link**.
- 4 Post the call link to a channel.

## Allow others to draw on your screen


By default, your teammates can draw on your screen while you're presenting. To turn this off, click the  **group drawing** icon. You can also draw on your screen by clicking the  **pencil** icon. Use this tool to draw attention to specific sentences, charts, data points, or whatever else is important to call out.

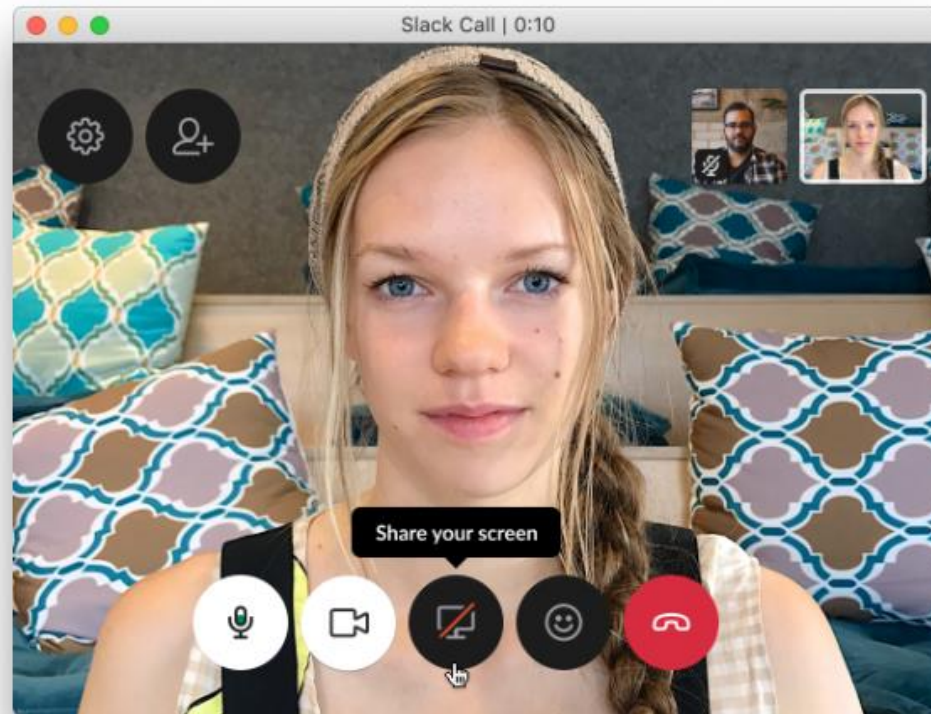


# SCREEN PRESENTATION IN SLACK

---

## Present your screen

During a call, any participant can present their screen by clicking the  **Share your screen icon**.



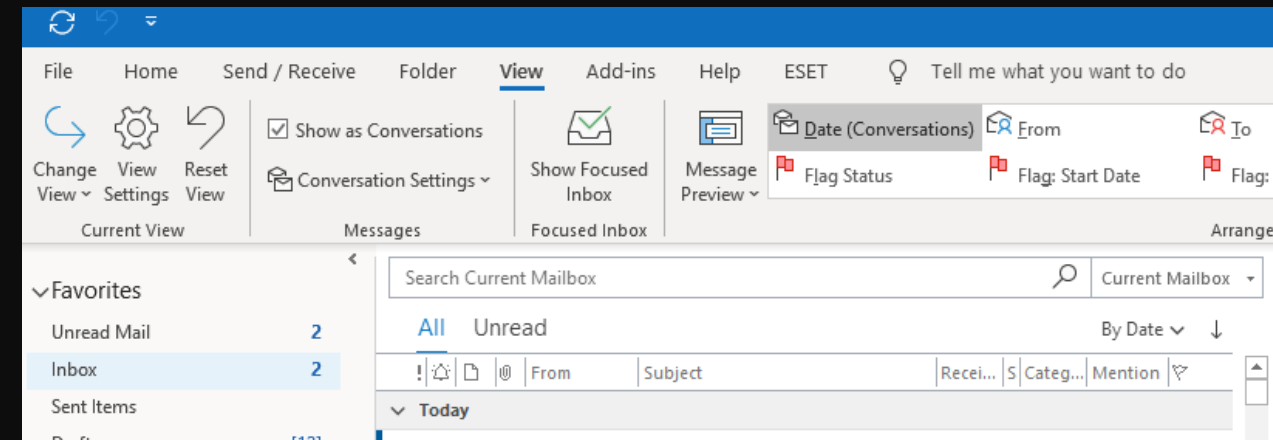
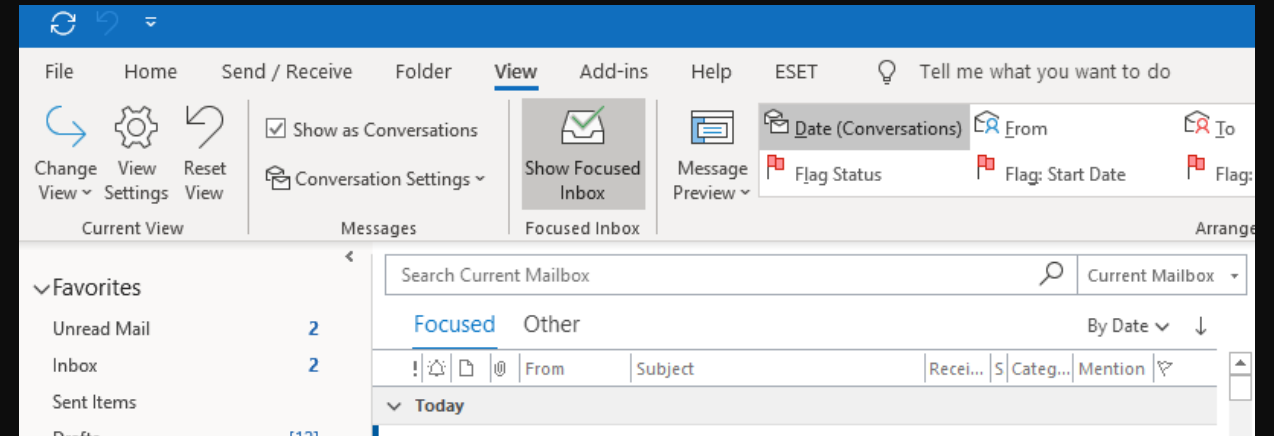
# Outlook

---

Basics

# OUTLOOK BASICS – INBOX FEATURES

- Focused vs. Standard
  - Focused Inbox separates your Inbox and adds the emails you open frequently to your Focused inbox
  - All other email goes into the Other inbox
  - To disable Focused Inbox go into View in Outlook and turn off Focused Inbox
- Junk Mail
- Rules



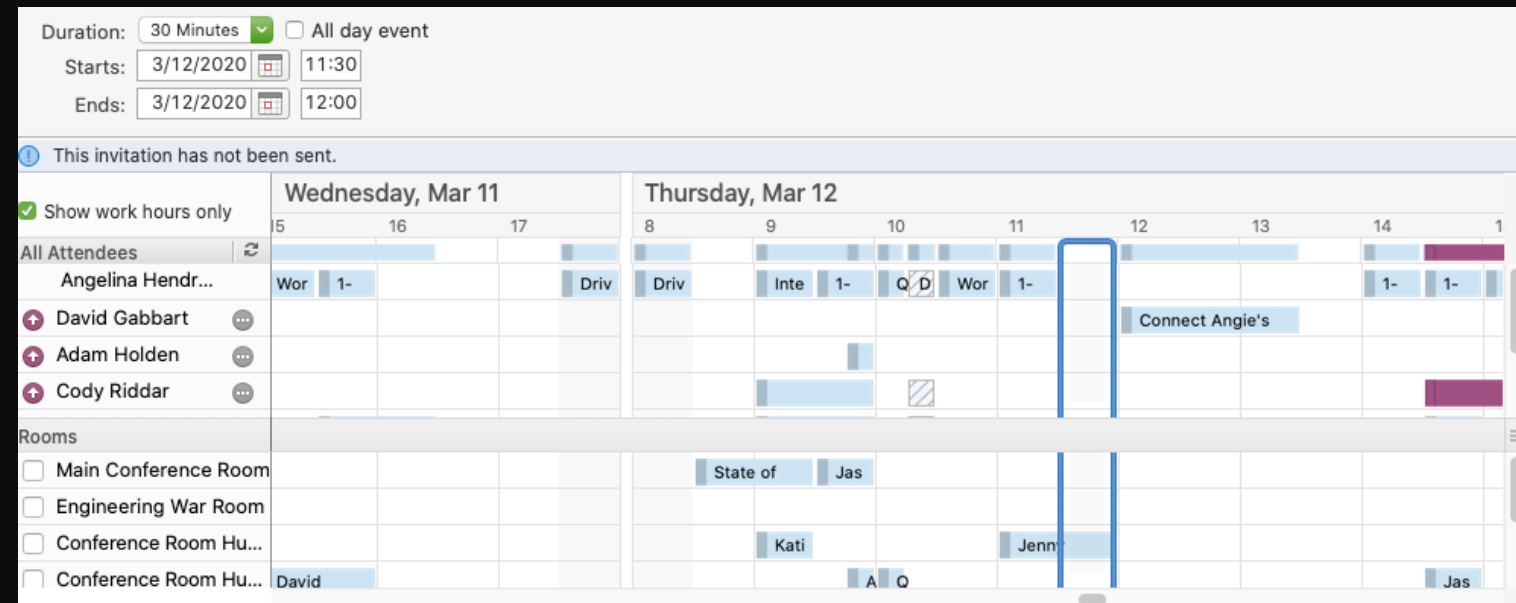
# OUTLOOK BASICS – MEETING SCHEDULING

- Create a meeting
- Add attendees
- Determine when everyone is free
- Book a conference room

Top skinny bar shows when all attendees are free or scroll up and down to see each person's availability

This screenshot shows the 'New Meeting' form in Outlook. The top ribbon includes buttons for 'Send', 'Cancel', 'Appointment', 'Scheduling', 'Skype Meeting', and 'Teams Meeting'. The form fields are as follows:

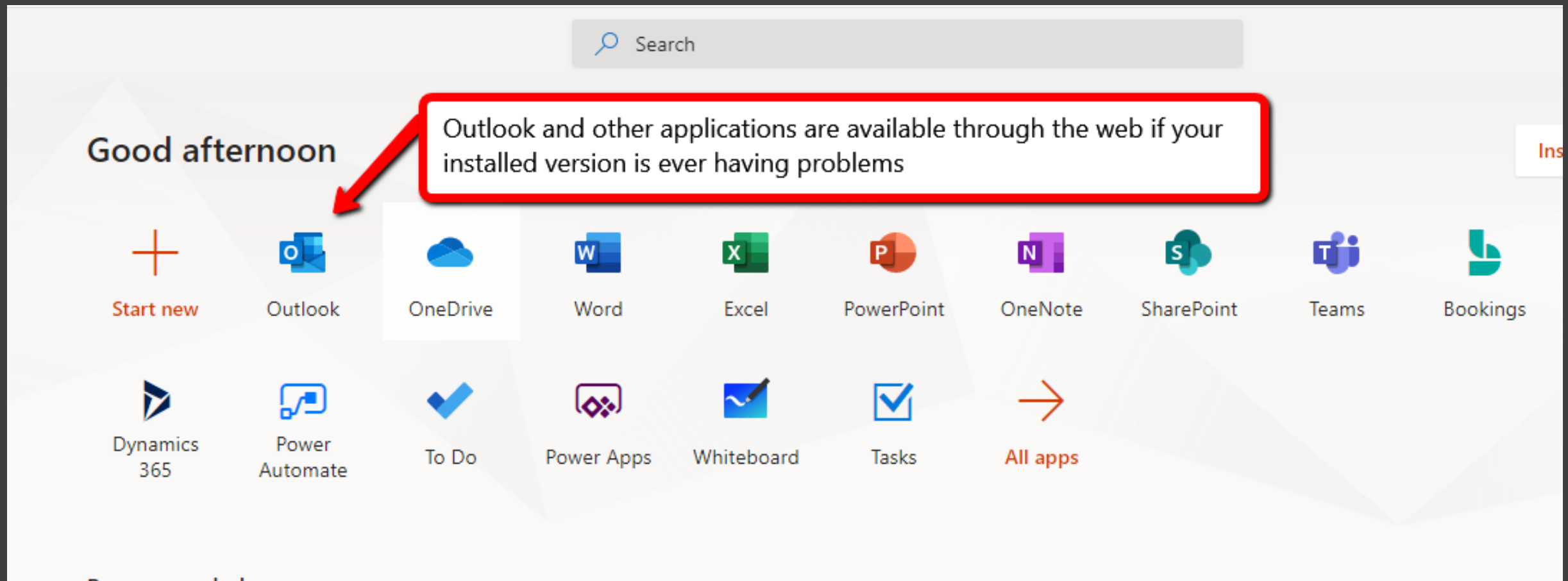
- From:** Calendar - angelina@esub.com
- To:** David Gabbart, Adam Holden, Cody Riddar, Jason Epel, David Lynch
- Subject:** Meeting about Meetings
- Location:** (Empty)
- Duration:** 30 Minutes (selected), All day event (unchecked)
- Starts:** 3/10/2020, 13:00
- Ends:** 3/10/2020, 13:30





MYAPPS.MICROSOFT.COM

- If classic Outlook fails to function you can access your email using the Outlook App in your myapps portal
- This is where you will also find your other apps including all SSO'd (single sign-on) apps

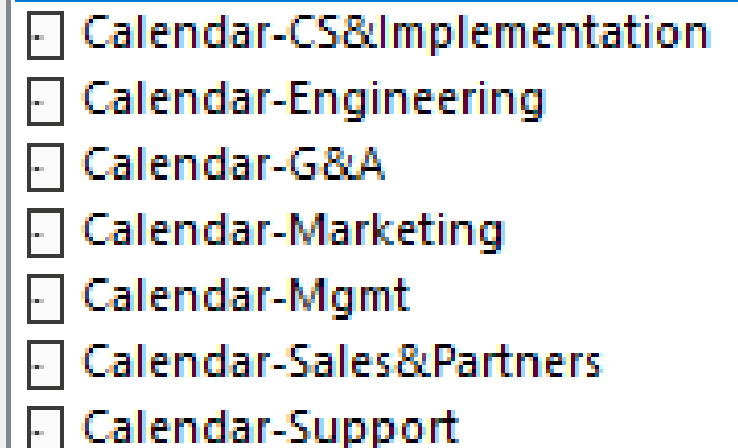


# TEAM CALENDARS

---

# TEAM CALENDAR PROCESS

- Create a meeting on your personal calendar and add the Team Calendar from the room list in the address book (Mac Outlook only need to add as a required attendee) -- this is just like how you book a meeting room
- Add all needed information in the Subject (do not include your name) line and Details section of the meeting
- Send the meeting and you will receive an acceptance response from the Team calendar
- The calendar will automatically add your name in front of the subject
- Details of your meeting are only visible on your personal calendar
- When to add an event to the Team Calendar? Whenever you are working from a different location than normal such as:
  - You usually work in the SD office but are working from home today
  - You usually work from your home office in Timbuktu but are in the SD office today
  - You are attending a trade show
  - You are on a business trip
  - You are taking a sick day
  - You are vacationing in Bora Bora

- 
- A screenshot of a software interface showing a list of calendar options. Each option is preceded by a small square icon with a horizontal line through it. The list includes: Calendar-CS&Implementation, Calendar-Engineering, Calendar-G&A, Calendar-Marketing, Calendar-Mgmt, Calendar-Sales&Partners, and Calendar-Support.
- Calendar-CS&Implementation
  - Calendar-Engineering
  - Calendar-G&A
  - Calendar-Marketing
  - Calendar-Mgmt
  - Calendar-Sales&Partners
  - Calendar-Support

# TEAM CALENDARS

The screenshot displays a Microsoft Outlook calendar interface. On the left, a sidebar shows a list of calendars under 'My Calendars', 'Team: Angelina Hendricks', 'Other Calendars', and 'Shared Calendars'. The 'Rooms' section is checked, listing several calendars including 'Calendar-Engineering', 'Calendar-CS&Implementation', 'Calendar-G&A', 'Calendar-Marketing', 'Calendar-Mgmt', 'Calendar-Sales&Partners', and 'Calendar-Support'. The main calendar area shows a weekly view for December 2 - December 6, 2019 (Week 49). The top bar indicates the current date is Wednesday, December 11, 2019, with weather information for Washington, D.C. (41°F/31°F). The calendar view shows various events and meetings, including 'Weekly Conference', '1-on-1', 'Work', 'Integration Next Mai', '1-on-1', 'Zen Desk Implement', 'IT', '1-on-1', 'Work', 'Share', 'Coffee with La', 'Wome', 'Discuss', 'Eng', '1-on-1', 'Work', 'Dep', 'Joe - PTO', 'Patty Back of', 'Craig Wren', and 'Joe Ortiz WFH Calendar-Support'. The bottom status bar shows 'Items: 83' and 'This folder is up to date. Connected to: angelina@esub.com'.

December 11, 2019

Washington, D.C. Today 41° F / 31° F Tomorrow 39° F / 34° F Friday 46° F / 44° F

Search Calendar-Engineering - Calendar

Home Organize Tools

Appointment Meeting New Items Today Day Work Week Week Month Open Shared Calendar Calendar Permissions Find a Contact Address Book

December 2019

December 2 - December 6, 2019 (Week 49)

angelina@es...

Calendar-S...

Joe - PTO

Patty Back of

Patty Back of

Craig Wren https://

Joe Ortiz WFH Calendar-Support joe@esub.co

Items: 83

This folder is up to date. Connected to: angelina@esub.com

# ADDING EVENTS TO THE TEAM CALENDARS

- To add an event to a Team calendar you schedule it the same way reserve a conference room by adding the Team calendar as a location to your meeting from your calendar meeting setup, which then also adds the Team calendar as a required attendee, and then click Send
- Make sure you receive an Accepted message from the Team Calendar as this is confirmation you have setup the Team event correctly
- All Team Calendars are visible to everyone

The screenshot shows the 'Invited Event' window in Microsoft Teams. The title bar includes 'File', 'Invited Event', 'Scheduling Assistant', 'Insert', 'Format Text', 'Review', and 'Help'. The ribbon contains 'Delete', 'Forward', 'Skype Meeting', 'Teams Meeting', 'Meeting Notes', 'Cancel Invitation', 'Address Book', 'Check Names', 'Response Options', and 'Reminders'. A message states: 'You haven't sent this meeting invitation yet.' The form fields are as follows:

Field	Value
Title	OOO Calendar EXAMPLE
Required	Calendar-Engineering
Optional	
Start time	Thu 3/19/2020 12:00 AM
End time	Thu 3/19/2020 12:00 AM
Location	Calendar-Engineering

Additional options include 'All day', 'Time zones', and 'Make Recurring'.

# GOTOMEETING

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VIDEO CALLS, MEETINGS, SCREENSHARING

# GO TO MEETING BASICS

---

- **You're invited**
- The invitation email or message will include a link to the meeting
- The invitation will also include instructions for using the phone or your computer's mic and speakers (VoIP) for audio
- **Be prepared**
- Join the meeting a few minutes early to make sure you have everything you need
- If you don't already have the software, it will download automatically, and you'll be placed into the meeting
- **Join the meeting**
- Click your online meeting link, or go to [gotomeeting.com](https://gotomeeting.com) and enter the meeting ID
- If your host requires one, be sure to have the meeting password handy

# GO TO MEETING BASICS CONT.

---

- **Talk and listen**
- Check the online meeting invitation or your Control Panel to see the audio options available
- If the option to dial-in is offered and you'd like to use it, call in using the telephone number and access code shown. Enter the audio PIN if provided
- You can also use your computer's mic and speakers (VoIP). For the best experience, we recommend using a USB headset with this option
- **Know who's speaking**
- The bottom of your meeting window and the Control Panel both indicate who's speaking
- When you are speaking, meeting attendees will see your name if you connected with mic and speakers or if you dialed in and entered your **audio PIN**



# GO TO MEETING BASICS CONT.

---

## ➤ Interact

- You can mute yourself when you're not speaking. The host can also mute you or all attendees. If you dialed in using a phone, you'll need to use the audio PIN to mute your line via the GoToMeeting controls
- The easiest way to share your webcam is to click the button on the grab tab. Or you can click the Share My Webcam button on the Control Panel
- Pause and resume your webcam by using the icons in the top-right corner of your webcam feed
- If you are muted or don't want to interrupt the speaker, you can use the chat feature to communicate with the group, the host and/or other individual attendees
- The host can make you the presenter or give you control of the shared screen. When you're the presenter, additional controls will appear on your grab tab

# GO TO MEETING BASICS CONT.

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- **Leave the meeting**
- When you're ready to leave a meeting, click the icon at the top of the meeting window  
(You'll be prompted to confirm that you want to leave)

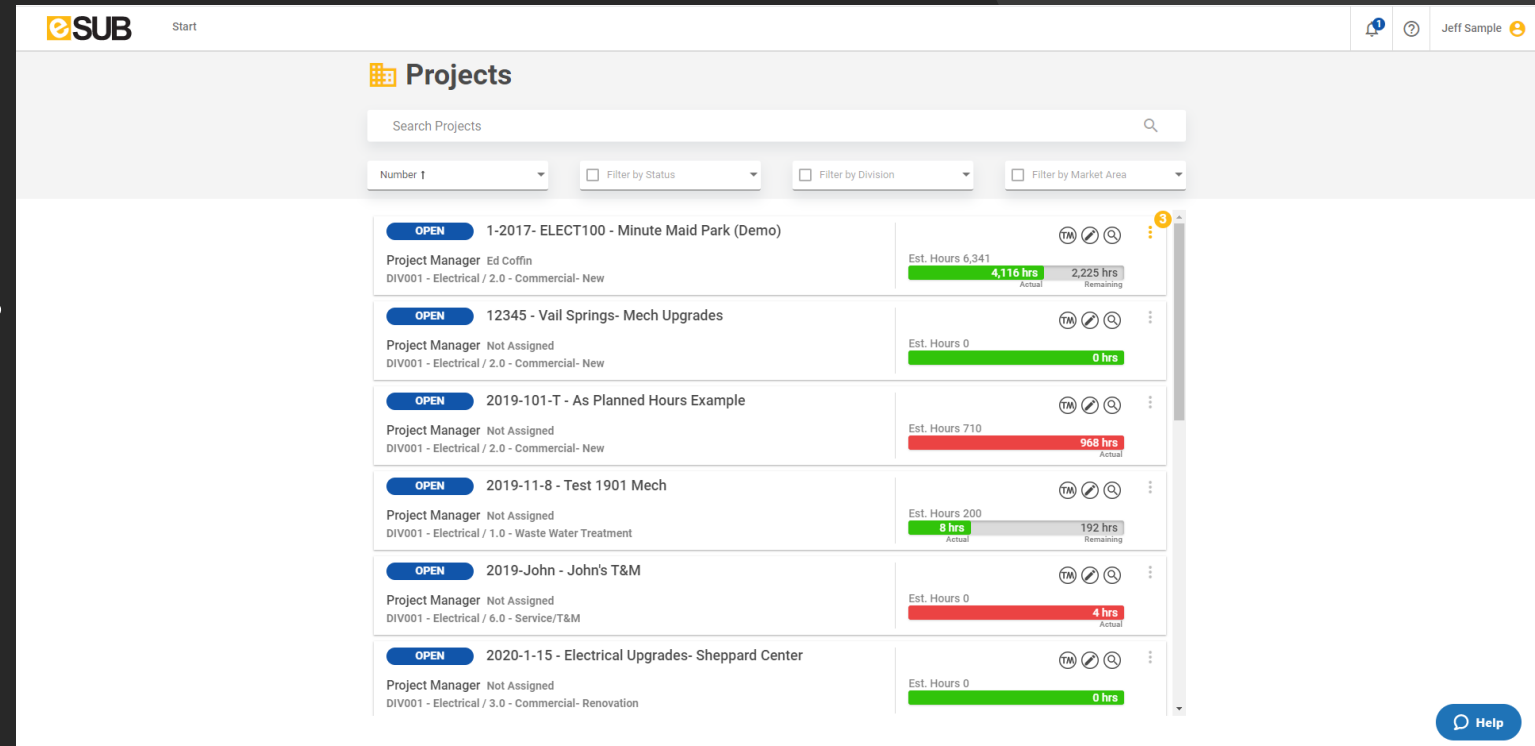
# Project Controls

Everyday you leave  
could be your last for a  
while

# Documentation is critical

## Project Management Basics

- Document work in place
  - Photos
  - Videos
  - Notes
- Centralized Document Controls
  - RFI
  - Change Orders
- Scheduling
  - Supply Chain
  - Manpower
- Real time Information
- Stored in the Cloud



## Cloud-based project management and document control software

Share documents and data between the office and the field in real time

Designed specifically for subcontractor document workflows

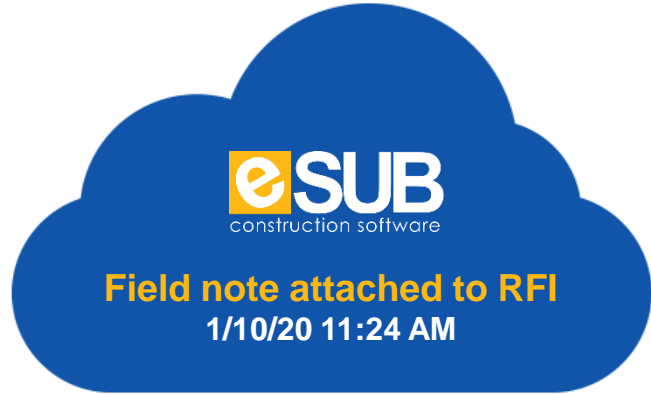
Communicate, share and track project documents in a single location

Automated workflows eliminating tedious paperwork





### 1. Photo Taken in Field



### 2. Notes & Keywords #Change Order



### 3. Office Generates Docs



# Document Controls

[illegible]

Submittal Log

Excel®

Print

Print Multiple Transmittals

Print Multiple Submittals

SEARCH

Sub No:

Trans No:

Rel No:

Text:

S/RT Type: 

All

Status: 

All

ACTION	Sub No	Trans No	Rel No	Send To	Spec Section No	Reason For Sending	Copy To	Date Sent	Return By	Returned On	Custom Text	Custom Numbers	Custom Dates	Status	
				Subject											
				PO No	Notes										
				Line Items											
<div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div></div>	1	1	0	Turner Construction	23 30 00	For Approval		1/26/2015	2/2/2015	01/26/2015	PO 1234			Sent	
				Added diffusers for electric rooms.											
				Any submittal notes can be entered here.											
				2 Line Items (click to expand)											
<div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div></div>	2	2	0	Turner Construction		For Approval		1/26/2015	1/28/2015	01/30/2015				Revise and Resubmit	
				EXAMPLE - Returned and Late											
<div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div></div>	3	3	0	Turner Construction		For Approval		1/26/2015	2/11/2015	01/28/2015				Pending	

# Collaborative Submittal Log

<https://www.support.esub.com/hc/en-us/articles/207178687-Create-Submittals-Transmittals->



## Change Order Request Log

Excel®

Print | Print Multiple

SEARCH















COR No:

Text:

Status: Approved ▼

Work Type: All ▼





Search results for

ACTION	COR Number ⌵	Other Reference No ⌵	GC COR / RFI No	CURRENT STATUS	Labor Hours	Labor Cost	Equipment Cost	Material Cost	Subcontractor Cost	Overhead Cost	Cost	Cost	Other and Small Tools Cost	Total Cost	Amount Quoted	Amount Approved	Markup %	
		COR Subject							Issue Thread									Lines
		COR Date ⌵		Action Date		Comments / Time Extension Request												
      	93	Original Contract Amounts			—	7,285.00	\$25,500.00	\$0.00	\$336,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$361,500.00	\$1,244,500.00	\$1,244,500.00	244%
		1 (Rev 0)-		A	2.00	\$100.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00	\$247.25	\$175.00	59%
		Fan Upgrade							RFI: 150 (Rev 0)-5/22/2019-									2
		12/4/2019			2/6/2020													
      	91	1234	2444	A	200.00	\$7,000.00	\$0.00	\$719.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,719.00	\$17,290.90	\$17,290.00	98%	
		New Switch							RFI: 203, Other Reference No: 1234									5
		10/2/2019			11/4/2019													





# Change Order Tracking

<https://www.support.esub.com/hc/en-us/articles/206474688-Create-new-Change-Order-Request>

Incoming Emails for Number: 15 (Revision 0)

ACTION	Number	From	Preview	Date
 	10360  	Benny Baltrotsky	RE: Palos Community Hospital project Submittal No: 01-243-CS-15 - See attached for update. From: Benny Baltrotsky Sent: Monday, March 9, 2020 9:31 PM To: Benny	3/9 9:32 pm






























Sent Emails for Number: 15 (Revision 0)

ACTION	Number	Who	Preview	Date
	30485 	Benny Baltrotsky , Benny@esub.com, benny@esub.com	Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta	3/9 9:29 pm
	30466 	Benny Baltrotsky , esubtrial@gmail.com, benny@esub.com	Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta	12/4/2019 10:47 am

DOCUMENT  
SPECIFIC EMAIL  
TRACKING

- <https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration>

# CENTRALIZED PROJECT INBOX

Project Inbox					Excel®	Printer
<div> <div>SEARCH</div> <div>Subject / Body: <input type="text"/></div> <div>Sender / Recipient : <input type="text"/></div> </div>						
ACTION	Number	From	Preview	Date		
  	10294  	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-96 (Rev 0) - From: Benny Baltrosky Sent:	4/25/2018		
  	10287 	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-95 (Rev 0) - What is this From: Benny Baltrosky	4/1/2018		
  	10285  	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-95 (Rev 0) - See attached for update From: Benny	3/30/2018		
  	10284  	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-94 (Rev 0) - See attached for update From: Benny	2/26/2018		
  	10279  	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-91 (Rev 0) - See attached for update From: Benny	2/7/2018		
  	10246  	Benny Baltrosky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-85 (Rev 0) - See attached From: Benny Baltrosky	9/27/2017		

<https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration>